User's Guide

Tripolis Mail 2.8.0

TRIPOLIS SOLUTIONS

Table of Contents

1 Introduction 5

1.1 What is Tripolis Mail? 5
1.2 The parts of the Tripolis Mail application 5
1.2.1 List Management 5
1.2.2 Content 6
1.2.3 Mailings 6
1.2.4 Statistics 6
1.2.5 Administration 6
1.3 Creating a mailing in Tripolis Mail – a visual overview 6
1.3.1 Terms used in this manual 7

2 Using Tripolis Mail on your PC 8

2.1 System requirements 8
2.2 Logging on to Tripolis Mail 8
2.3 Navigating through Tripolis Mail 9

3 List Management 10

3.1 About this section 10
3.1.1 About databases and lists 10
3.1.2 About CSV files 10
3.2 Creating a database and a list in Tripolis Mail (Import Wizard) 11
3.2.1 Importing a CSV file 11
3.2.2 Creating an empty database 12
3.3 Importing a CSV file into an existing database 13
3.4 Viewing a report on the import operation 13
3.5 Specifying test lists 14
3.6 Managing subscribers 15
3.6.1 Viewing the properties of a database or a list 15
3.6.2 Viewing the subscribers in a database 16
3.6.3 Viewing the subscribers in a list 17
3.6.4 Searching for subscribers 17
3.6.5 Deleting subscribers 18
3.6.6 Subscriber status 19
3.6.7 Selecting records from a database or list (Selection Wizard) 20
3.6.8 Removing duplicate records from a database or a list (Exclude Wizard) 21
3.6.9 Merge or split of lists 21
3.6.10 Editing a subscriber's details 22
3.6.11 Adding a subscriber to a mailing list 22
3.6.12 Exporting subscribers (Export Wizard) 23
3.6.13 Importing a Veritate CSV file into Microsoft Access or Microsoft Excel 23
3.6.13.1 Importing a CSV file into MS-Access 23
3.6.13.2 Importing a CSV file into MS-Excel 24

4 Content Management 26

4.1 Overview 26
4.2 Navigating through the content module 26
4.2.1 About Templates 26
4.2.2 CMS template 27
4.2.3 Visual Editor template 28
4.2.4 Static HTML Template 28
4.2.5 Counters – recording subscriber reactions to your emails 28

4.3 Creating a newsletter 29
4.3.1 Step 1 – Choose and design a template type 29
4.3.2 Step 2 – Create an e-zine 29
4.3.3 Step 3 – Create an edition 32
4.3.3.1 Creating a newsletter using a CMS template 32
4.3.3.2 Creating a newsletter using a Visual Editor template 34
4.3.3.3 Using a Visual Editor 35
4.3.3.4 Icons used in the Visual Editor 37
4.3.3.5 Inserting internal links 38
4.3.3.6 Creating a newsletter using a static HTML template 38
4.3.4 Printing a newsletter 39

5 Creating and sending a mailing to subscribers 40

5.1 Viewing a list of transmitted newsletters 40
5.2 Sending an edition to a list of subscribers 41
5.2.1 Personalising your mailings 42
5.2.2 Email notification 42

6 Statistics 43

6.1 Database and mailing list statistics 43
6.1.1 Mailing list statistics 43
6.2 Mail statistics 44
6.2.1 Quick View 46
6.2.2 Mail 46
6.2.3 Opens 47
6.2.4 Clicks 47
6.2.5 Click Channels 48
6.2.6 Compare statistics 48
6.2.7 Querying statistics 48
6.2.7.1 Operators used for querying mail statistics 48
6.2.8 Exporting statistics 50
6.3 Click Channels 50
6.3.1 Adding a new Click Channel 50

7 Administration 52

8 Appendix 53

8.1 About Mail Types 53
8.1.1 Email contains HTML and plain text (Multipart) 53
8.1.1.1 Type 0: ASCII + HTML – images not included 53
8.1.1.2 Type 1: ASCII + HTML – images included 53
8.1.2 Email contains HTML only 54
8.1.2.1 Type 2: HTML – images not included 54
8.1.2.2 Type 3: HTML – images included 54
8.1.3 Email contains text only 54
8.1.3.1 Type 4: text version 54
8.2 RSS 54
8.2.1 Including RSS feeds 54
8.2.2 Publishing RSS feeds 55
8.3 Tips for successful Email publishing 55
8.3.1 Choose relevant topics 55
8.3.2 Keep your subscriber list up-to-date 56
8.3.3 Separate objective content from commercial information 56
8.3.4 Avoid upper case text 56
8.3.5 Use white space carefully 56
8.3.6 Do not send lengthy emails 56

8.3.7 Be brief and to the point 56
8.3.8 Use short paragraphs 56
8.3.9 Aim for a constant delivery schedule 56

9 Index.....57

1 Introduction

1.1 What is Tripolis Mail?

Tripolis Mail is web-based software that allows you to create electronic newsletters and direct marketing emails. Tripolis Mail offers you a set of easy-to-use tools for creating content in HTML or text format. With Tripolis Mail you can easily create newsletters that match your company's image and requirements.

Your subscribers, those who receive your newsletter, register their interest in your company or products online, via your company website, or you can import a database of subscribers into Tripolis Mail.

Using one or more templates, specially designed by Veritate engineers for your company, you quickly and efficiently create newsletters without requiring any special knowledge of HTML code. In addition to text content, your mailing can contain images, and links to other sites. You merge the newsletter with a list of subscribers and transmit it at a selected date and time.

Tripolis Mail offers you an extensive set of tools for managing your subscribers. Using Tripolis Mail wizards, you can compare subscriber lists and remove duplicate subscribers, select subscribers and create new lists based on your selection criteria (in general terms, a list as a selection from a database). For example, you can select subscribers who live in a particular city or who are in a specific age group. You then create and transmit a newsletter specially aimed at this interest group. You can export a file of subscribers and open it in Microsoft's Excel or Access applications.
Example: you manage a large retail sports outlet. Your assortment includes surfboards, diving and sailing equipment. Your customers sign up to a mailing list from your website. During registration they record the sports they are interested in. From your database you select those interested in diving, for example, and create and transmit a newsletter with special diving-related content.

Tripolis Mail also offers you tools for recording statistics on email transmission and email openings by recipients. For example, you can view data on the number of successful transmissions and on the frequency of clicks on a link in your mailing.

1.2 The parts of the Tripolis Mail application

Tripolis Mail is an easy tool to use – you access the different parts of the application by clicking options from a toolbar and navigating through a tree structure. In general terms, these options correspond to the functional areas (modules) in the application. Below, we'll briefly describe each module (all the modules are discussed in detail later on in the manual). When you start Tripolis Mail, you'll see that the areas below correspond to the buttons on the Tripolis Mail opening screen

The buttons you see in your Tripolis Mail browser are user dependent – what you see depends on your user permissions.

1.2.1 List Management

This module is where you create and maintain your databases and lists. In Tripolis Mail, consider a database as a container for one or more lists; for example, from subscriber database of sports data, you could create a list of those interested in canoeing, if the relevant information was available in the database. A list is thus a selection of subscribers from the database. A list serves as the "unit of transmission" for a newsletter: when you send a newsletter to subscribers, you select a list and transmit the newsletter to all the subscribers in the list. The database contains the entire set of subscribers, and one subscriber can be a member of several lists in the same database. For more information see section 3.

1.2.2 Content

In this module you create the content of your mailings. You create a mailing in HTML or plain text format using ready-made templates provided by Veritate engineers. Alternatively you can upload your own HTML or text version. This is also the area where you enter static information that does not change with each newsletter, for example items such as " Default Subject", "From", "Return-Path" and so on. These topics are covered in section 4.

1.2.3 Mailings

You combine a newsletter with a list and transmit it to your recipients. You can send a mailing immediately or schedule it for transmission at a later interval. These topics are covered in section 5.

1.2.4 Statistics

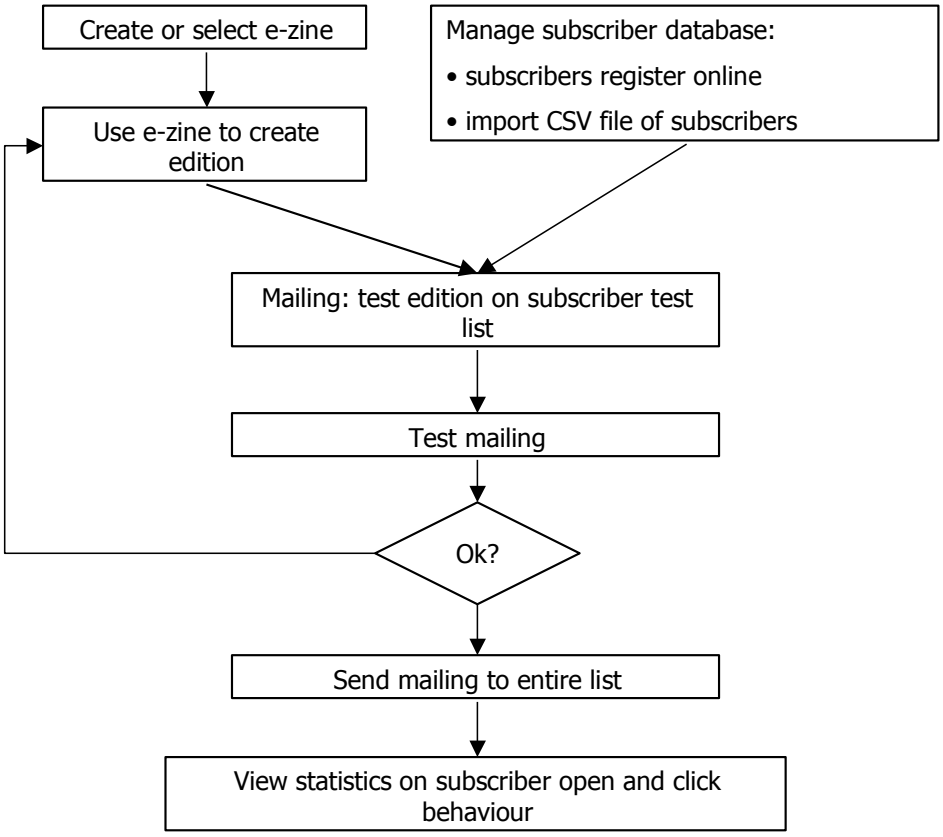
Once you have sent a mailing, you can view a variety of statistical data on recipient behaviour, online and in real-time. In addition to data on the number of successful and failed deliveries, information is available on the frequency of 'opens' (recipient opens the email), and the frequency of 'clicks' (the recipient clicks a URL included in the email). These topics are covered in section 6.

1.2.5 Administration

In this module you modify the access options and permissions of Tripolis Mail users, that is, staff in your company who use Tripolis Mail. For more information, see section 7.

1.3 Creating a mailing in Tripolis Mail – a visual overview

The diagram below is an overview of how a mailing is created and sent to recipients in Tripolis Mail. The accompanying paragraphs provide a brief outline of each stage.


Create or select e-zine
Manage subscriber database:
• subscribers register online
• import CSV file of subscribers
Use e-zine to create edition
Mailing: test edition on subscriber test list
Test mailing
Ok?
Send mailing to entire list
View statistics on subscriber open and click behaviour

Create the e-zine
Together with a Veritate engineer you create an e-zine that serves as the basis for creating your editions. You usually perform this operation once only. Your e-zine specifies the template that you will use to create editions, and static information that does not change from edition to edition. For more information, see section 4.

Create the edition
Using the template specified in the e-zine, you enter text, images and links (URLs) in a new edition. For more information, see section 4.

Manage your subscribers
Your subscribers subscribe to your newsletter online, or you import a database of subscribers. For more information see section 3.

Create a mailing
When you are ready to test the edition, you send it to a small test list of subscribers. When you are satisfied with the results, you transmit the edition to the full list. For more information, see section 5.

View statistics on the mailing
Once the mailing has been transmitted you'll want to view data on deliveries, bounces, open actions, and on the frequency of 'clicks', that is, how often the subscriber clicked a URL you included in the email. For more information see section 6.

1.3.1 Terms used in this manual

The following table briefly outlines the terms used in this manual.

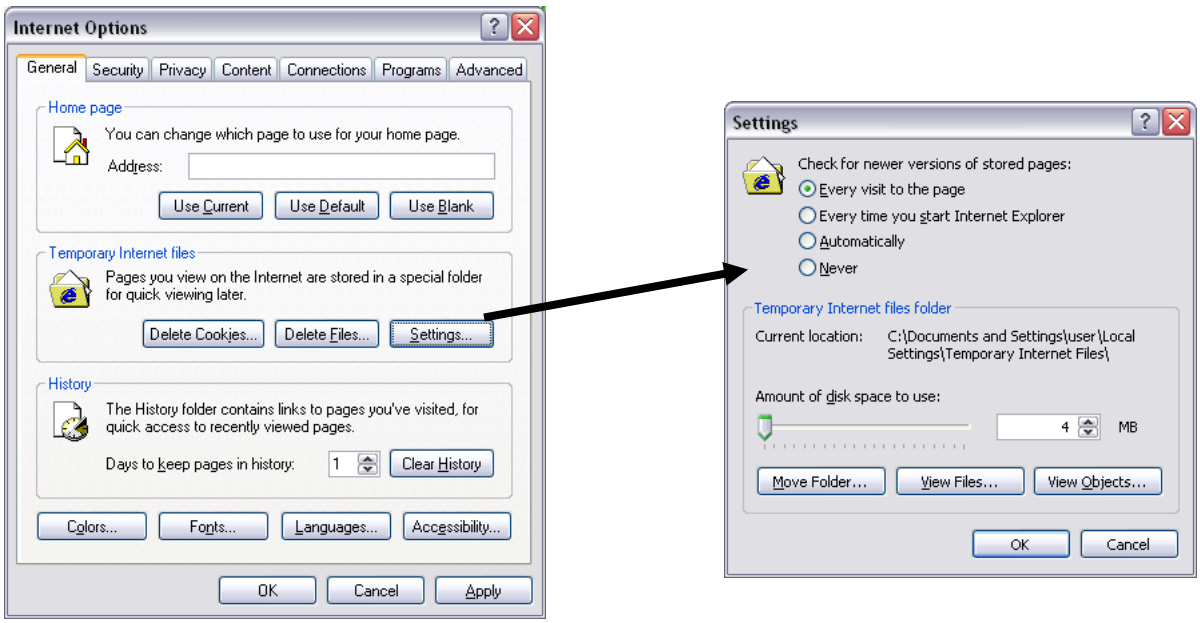
Term	Definition
e-zine	Serves as the foundation for all your editions, that is, it defines the static, non-changing properties of editions you will create, including the template used and mail headers.
Template	A file that defines the basic structure of an edition. Each time you create an edition, you base its content on the template specified in the e-zine.
Edition	A file in HTML or text format that you create for your mailing. Comparable to an issue of a magazine, it contains the text, images and links that you will transmit to your subscribers.
Mailing	The email that is sent to subscribers; also called a **Newsletter** or an **Email**.
Subscriber	A member of your subscriber database; also called a recipient in this manual.
User	The employees in your organization who use the Tripolis Mail application. In the text, gender-specific references (*his* email or *his* file) are used for convenience only and refer to both sexes. Each client should have one key user. This is the main contact person for Veritate. This person also will receive the product updates. A so called certified user is a user who followed a training by Veritate. Both the certified as the key user are allowed to consult the Veritate helpdesk (+31.20.4710777); they both received the training. Other users should ask their questions to certified users or key user.

2 Using Tripolis Mail on your PC

2.1 System requirements

Tripolis Mail system is a fully web-based application – you logon to and use Tripolis Mail from your web browser. You should use Microsoft Internet Explorer for Windows, version 5.5 or higher or Mozilla (1.7 or higher)/Firefox (1.0 or higher) on any platform. You will need Internet Explorer for Windows version 5.5 or higher for creating editions (see section 4) with the visual editor. Your browser should be set to enable session cookies and JavaScript.

In IE you can also set options that define how often the browser checks the currency of web pages (whether a web page is up-to-date). For use with Tripolis Mail, it should be set to "every visit to the web page". To do this, start IE and select **Tools > Internet options**. In the **Temporary Internet files** section of this screen, click the **Settings** button. In the Settings screen, click the **Every visit to the page** radio button **on**.



You should not use a proxy configuration, to prevent problems with caching of dynamic web pages. Ensure that your Internet connection is as fast as possible. Contact your system manager or the Tripolis Mail helpdesk for more information.

Note on pop-up killers: when you preview an edition in Tripolis Mail, a separate HTML page appears. If you use a "pop-up killer" on your PC, the application may interpret the preview screen as a popup and disable it. To avoid this, ensure that your pop-up killer allows pop-ups from the Tripolis Mail site.

2.2 Logging on to Tripolis Mail

You connect to Tripolis Mail using the URL that was provided during your user training session.

Type *https://edm.veritate.net/* in your browser window.
In the opening screen that appears, enter your Client name, User name and Password and click **Enter**.

- Your Tripolis Mail session closes automatically after 30 minutes if you leave it unattended. Any unsaved data is lost. Log on again to resume your session. You can log out manually by clicking on the log out link, which can found on the right in the main menu of Tripolis Mail.

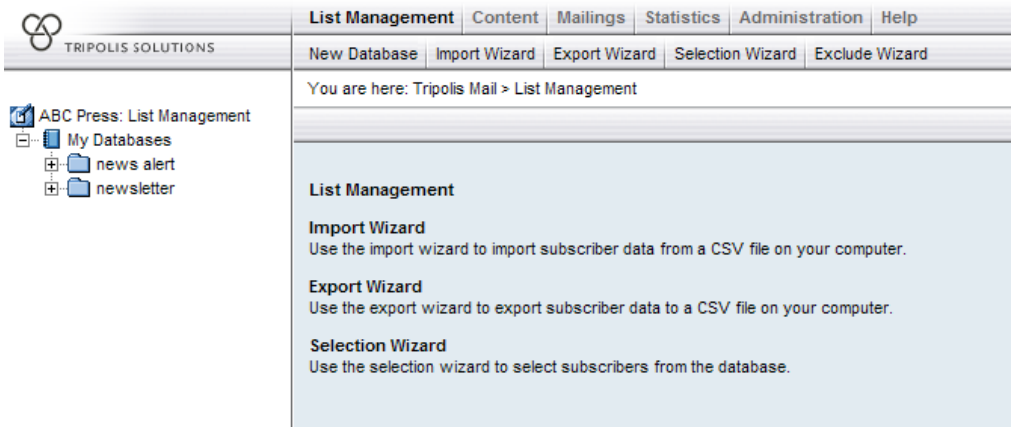
- Do not open Tripolis Mail in several windows simultaneously as this can lead to system errors and application failure.

2.3 Navigating through Tripolis Mail

Navigation in Tripolis Mail is intuitive and easy to learn, and is based on a so-called 'random access' structure – you access any screen or any part of the application from the screen you are currently working in.

Overview of Navigation: many Veritate screens consist of two areas – a tree structure on the left side of the screen and an area on the right side of the screen (see example below). The tree structure displays a list of items, for example, a list of databases or a list of e-zines. The area on the right side displays more information on the item you selected in the tree structure, or on an item you select from the top of the screen.

Example: start Tripolis Mail and click the **List Management** button. The left side of the screen displays a container icon named `My Databases`. This contains one or more database folders, each of which contains one or more lists (let's assume you have some sample lists or that lists are already present on your system). To view the lists within a database, click the + icon next to the database, if it's not already expanded. On the right side, the List Management submenu is displayed. This consists of the buttons **New Database**, **Import Wizard**, **Export Wizard**, **Selection Wizard** and **Exclude Wizard**. These buttons are explained in section 3 below.



Navigating further: If you click any of the submenus in the List Management screen, for example **New Database**, the screen on the right side changes to reflect this. In this case you are prompted to enter the name of a new database. For the moment, click **Cancel** to exit this screen.

The 'You are here' bar: Notice the **You are here** bar below the submenus – this displays your current location in Tripolis Mail and changes appropriately as you navigate through the application. It also serves as a navigation tool: click one of the items in the bar to navigate to the desired area. For example, to return to the opening screen, click **Tripolis Mail**.

To quickly go to a part of the application:

- From your current location, click one of the buttons **List Management**, **Content**, **Mailing**, **Statistics**, **Administration** or **Help** and navigate further, or
- Click an item in the tree view or click an item in the **You are here** bar.

Saving your data: On many data entry screens, for example the **Add subscriber screen**, you must click the **Save** button to save your data – Tripolis Mail does NOT prompt to save your data when you exit a screen.

3 List Management

3.1 About this section

List Management is the module where you manage your subscriber data, that is, you create databases and lists, and add, import, export, select and delete subscribers. You can also create new lists by making selections of subscribers from the database or by using the split list function. First you need to know a bit more about databases and lists. These two topics are discussed in the following section.

3.1.1 About databases and lists

Each record in a Tripolis Mail database will contain mandatory fields for the subscriber's email address, password and mail type (the mail type field describes the format of the mailing the subscriber will receive). In addition, the record will contain a number of optional profile fields, for example fields for age, sex, salutation, title, occupation, hobbies and so on that are defined by a user. Profile fields thus relate to the "purpose" or the subject of your database. The database contains the entire set of subscribers.

A list is a container for some of the records in the database. For example, from the database you can create a list by selecting from the database all subscribers younger than 35 or those that live in the UK or Sweden, or you can import a file and create a new list during the import process. A subscriber can be a member of several lists, for example a subscriber may be a member of lists for canoeing and surfing in a sports database. When you retrieve a subscriber from the database, Tripolis Mail displays the lists of which the subscriber is a member.

A list is the unit that you couple with a newsletter, that is, you produce the mailing by linking an edition with a list of subscribers in the Mailing module.

3.1.2 About CSV files

You will probably create a database and a list by importing a file in CSV (Comma Separated Values) format, so we'll consider this file first. A CSV file consists of rows of data. Every row contains the same number of fields of data. Each field is delimited by a comma or a semicolon and is enclosed in quotation marks (see the example below). Each field has a name, which is specified in the first row of the file (also called a Header row). Each row in a CSV file starts on a new line. A field name may consist of any alphabetic character (upper or lower case) or any digit. Do not use special characters such as `$`, { , } or the space character, as these cannot be used for personalisation and can lead to errors during the import process. The maximal length of a field name is 40 characters. You can edit a CSV file with an editor such as Windows Notepad.

The following is an example of a CSV file:

```
"email","password","mailtype","salutation","hobby"
"robert@abcpress.com","A21Q","0","Dear Mr. Johnson","diving"
"peter@abcpress.com","A22Q","4","Dear Mr. Brady","photography"
"jane@abcpress.com ","A23Q","1","Dear Dr. Casey","shopping"
```

Note that field names are always adjacent – do not leave spaces between the field names.
You can create a CSV file by saving an EXCEL file in a CSV type. Veritate recommends using MS Access.

In Tripolis Mail, any CSV file you import must contain a field named `email`, and optionally, two fields named `password` and `mailtype`. The `email` field is optional if you use a different key value as described below.

Key values: during the import process you will select one field to use as a key value, or identifier. The value in this field identifies the record (row) as being unique in the database. The email address is usually used as a key, so you cannot have two records with the same email address in the same database. If a record is not unique, Tripolis Mail indicates this during the import process and lists the

number of double entries found. If you choose the email address as a key, Tripolis Mail saves the email address once only in the database as key identifier. Two other fields, `password` and `mail type` are created by default by Tripolis Mail, but you can import these optionally into your database. In most cases your CSV file will contain optional "profile fields" such as `salutation` or `hobby` in the example above.

3.2 Creating a database and a list in Tripolis Mail (Import Wizard)

There are two ways to create a database in Tripolis Mail:

- Import a CSV file and create the associated database and list 'on the fly' during the operation. This is the usual method of creating a database in Tripolis Mail.
- Create an empty database in Tripolis Mail, then create an accompanying list and add subscribers to the list. You can do this by importing a CSV file of subscribers into the database, or by adding subscribers one by one.

You'll be most likely to use the first method, so we'll consider this first.

3.2.1 Importing a CSV file

The procedure below tells you how to import a CSV file and create a new database and a new list during the import process. For an overview of CSV files, see section 3.1.2.
Before you start: you should create a small CSV file similar to the one in shown in section 3.1.2 above and use this as a trial set.

1. Start Tripolis Mail and click the **List Management** button.
2. Click the **Import Wizard** button. The wizard guides you through the import process. For each step, click the **Next** button to proceed or the **Back** button to choose from a previous step.

Using the wizard, do the following:
3. **Step 1:** the wizard prompts you to specify an import file. Click the **Browse** button and navigate to the CSV file you want to import. In the Choose File screen, place your cursor on the file and click **Open**. The file is now selected.
4. **Step 2:** the wizard prompts you to select an existing database or to create a new database. Select `[create new]` from the dropdown list. A separate popup screen prompts you to enter a name for the database. Enter a name and click **OK** to exit this screen.
5. **Step 3:** the wizard prompts you to select a mailing list or create a new list. Select `[create new]` from the dropdown list. A separate popup screen prompts you to enter a name for the list. Enter a name and click **OK** to exit this screen.
6. **Step 4:** the wizard now prompts you to create a field mapping, that is, you define how Tripolis Mail will process each field in the CSV file when you import it into the database. For profile fields you have the following choices: (i) create a new field with the same name or (ii) do not import the field. For the mandatory `email` field, Tripolis Mail suggests that you select the field with the same name in the CSV file. The mandatory fields `mail type` and `password` are always present in the database. If your CSV file contains these fields, they will be imported into the database.
   The following three columns are present on this screen:
   a. **Column header:** displays the field names (header row) of the CSV file you are importing.
   b. **Database field:** contains Tripolis Mail's suggestions for field names in the database. For profile fields this is `[Create New]` or [None]. If you select [Create New], Tripolis Mail creates a field in the database with a name identical to the name in the corresponding header row field. To exclude the field from the import, click the arrow and select `[None]`. For an overview of mail types, see section 8.1 below.
   c. **Identity field**: a field that uniquely identifies each record you will import. Click the radio button **on** in the field that you want to select as identity field. By default this is

the `email` field but you can also select another field. By selecting another field the import might take longer. You cannot select the `password` or `mailtype` fields.

Default Mail Type: a Mail Type defines the format and content of the mailing that the subscriber will receive. The default Mail Type defines the Mail Type for rows in the import file that do not have a value in the Mail Type header, or where the import CSV file does not contain a Mail Type header. For more information on Mail Types, see section 8.1 below.

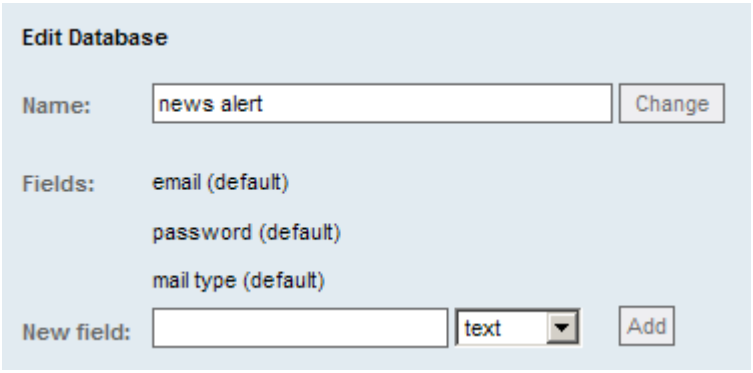
7. **Step 5**: Click the **Next** button to start the import process.
8. **Step 6**: Tripolis Mail informs you on how the import is progressing. This screen will progress to step 7 when the import process is complete. To move things along, click the **Refresh** button to update your progress message.
9. **Step 7**: Import confirmation – Tripolis Mail provides you with a report on the import operation. An explanation of a report is shown is section 3.4 below.

- Any records you add to a list are automatically added to the database associated with the list.
- Column headers can not start with a number.

3.2.2 Creating an empty database

The procedure is as follows:

1. Start Tripolis Mail and click the **List Management** button.
2. Click the **New Database** button.
3. In the Specify database properties screen that appears, enter a name for the database and click the **Save** button. On the next screen that appears, Tripolis Mail displays a list of all your databases.
4. Click the **Edit** button in the Action field of the database you just created. The Edit Database: Specify database properties screen appears.



Note the fields for email, password and mail type, which are already present in the database (the Mail Type field is explained in section 8.1 below). On this screen you create one or more profile fields for registering subscriber details such as age, salutation, sex, hobbies and so on.

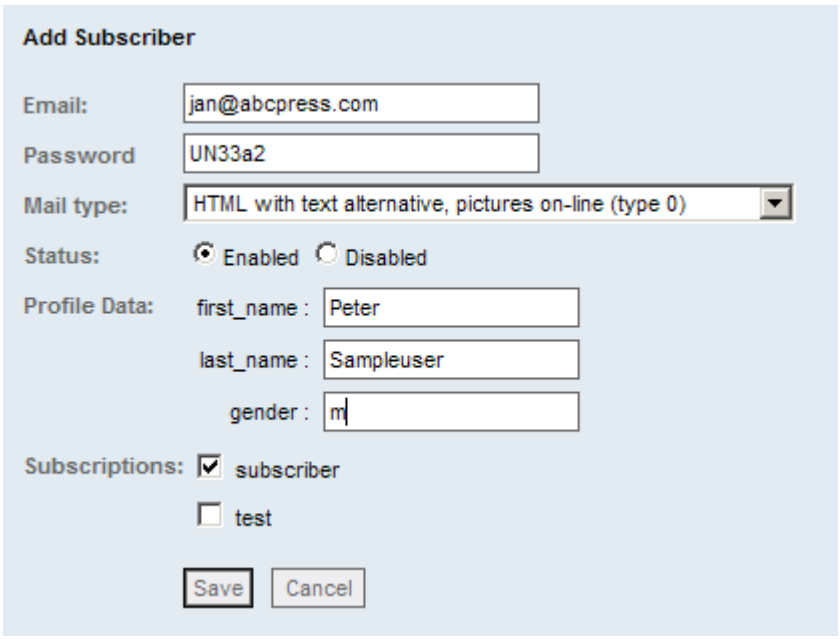
For each new field you create, first enter a name and click the ⇩ arrow to select the type of field you want to create. You have three options:

a. A text field for entering characters or character-digit combinations.
b. A numeric field for digits only.
c. A data field for entering birth dates in the format *dd-mm-yyyy*.

5. For each new field, click the **Add** button to add the field to the database. Two additional **Change** and **Delete** buttons appear. These allow you to change or delete the fields you created.

Your database is now added to Tripolis Mail. When you click the **List Management** button, Tripolis Mail displays your new database in the list of databases. You now create a list for the new database and add subscribers to the list.

a. Click the **My Lists** container of the database and then click the **New List** button.
b. Enter a name for the list in the **New list: Specify list properties** screen and click the **Save** button.
c. In the My Lists screen that appears, click the **Add subscriber** button.
d. Enter a valid email address in the Email field (mandatory) and the password field (optional) and select a Mail type from the dropdown list.
e. Enter data in the profile fields you created.



3.3 Importing a CSV file into an existing database

The procedure for importing a CSV file into an existing database is the same as for a new database, outlined in section 3.2.1 above, except that you select an existing database and list from the dropdown lists during the import process. At step 7, Tripolis Mail provides you with a report on the import operation (see section 3.4 below).

3.4 Viewing a report on the import operation

The following table is an example of the report Tripolis Mail produces for each import operation, either for an existing or a new database. This is produced at step 7 of the Import Wizard. The example below refers to files imported into an existing database, so the details will differ if you are creating a new database as described in section 3.2.

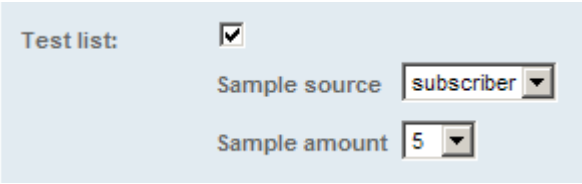
Message		**Explanation**
Total number of records:	10	The number of records in the import (CSV) file, including the header row.
Records with syntax errors:	0	The number of rows in the CSV file that could not be read due to some error, for example an email address that contained a comma.
Subscribers added to database:	9	The number of records successfully added to the database.
Subscribers already in database:	0	The number of records in the import file that were already in the database. Note that if you are importing into an existing database, fields present in an import file but not in the database will be created in the database for all subscribers. Conversely, if a field is not

Message		Explanation
		imported or is missing in a subsequent import for a subscriber already in the database, that field is retained in the database for the subscriber.
Existing subscribers not in import file:	11	The number of subscribers in the database prior to importing the file.
Total number of subscribers:	20	The total number of subscribers now in the database, including the number imported.
Subscriptions added to list:	9	The number of subscribers added to the list as a result of the import process.
Subscriptions already in list:	0	The number of subscribers in the import file that were already in the list.
Existing subscriptions not in import file:	0	The number of subscribers in the list that were not in the import file. You can remove these subscribers from the list (see note on Synchronise button below).
Total number of subscriptions:	9	The total number of subscriptions that are present in the list after the import process.

Synchronising
At the end of a report, a message similar to the following appears:
`"Click Synchronize to synchronize your list with your import file. This will delete 6 recipients in the list which are not present in the import file."`
This operation deletes those subscribers that were present in an existing list but not in the import file you imported to the list. If you created a new list, this value is of course 0. Click the **Synchronise** button to perform this operation.

3.5 Specifying test lists

In the Mailing Wizard (see section 5.2) you can choose between two types of test mails.
A normal test mail will send the newsletter in a HTML and TEXT version to all recipients of the selected mailing list. If you check 'test list' on the list properties screen, 'Test mailing' will be selected automatically in the Mailing Wizard.
The second form of test mails is called 'Sample test' and is only available if you define a sample source and sample amount on the list properties screen.



Once you checked 'test list', a list of available mailing lists in the same database will be displayed. Select the list which should be used as sample source. When you send the sample test mail, subscriber profile data of a random selection of recipients from the sample source list will be used to create sample test mails, which will be sent to the recipients of the test list. Sample amount indicates how many sample test mails will be sent to each recipient.

The sample test mailing can be used to control personalized features like a salutation or content personalization in your newsletter. Instead of using the data of your test list, you are able to use the real data of your sample source list, providing a more realistic test.

Example:

The newsletter uses a personalized salutation with merge fields like:
Dear $!{firstname} $!{lastname},

Recipient list:

Email	*firstname*	*lastname*
peterk@gmail.com	Peter	Keller
a3452@hotmail.com	Anna	
info@abcpress.com		
steve@miller.net	Steve	Miller
jdk@freenet.org	Janet	Kirsten
bambler@gmx.net	B.	Ambler

If you choose this recipient list as source mailing list for your sample data with a sample amount of 5, each recipient on your test list will receive 5 sample test e-mails including a salutation:

1) Dear Steve Miller,
2) Dear Anna ,
3) Dear ,
4) Dear Janet Kirsten,
5) Dear B. Ambler,

Every recipient on your test list will receive the test mails exactly like Steve, Anna etc. will, once the e-mail is actually being sent to them, including all mail headers and links. Be careful with unsubscribe and change links.

3.6 Managing subscribers

In this section you will learn how to:

1. Display the properties of a database or a list.
2. View all the subscribers in a database or a list.
3. Search for subscribers.
4. Delete subscribers from a database or a list.
5. Select subscribers from a database or a list.
6. Edit a subscriber's details.
7. Edit status of a subscriber
8. Remove duplicate email addresses from a database.
9. Add subscribers to a mailing list.

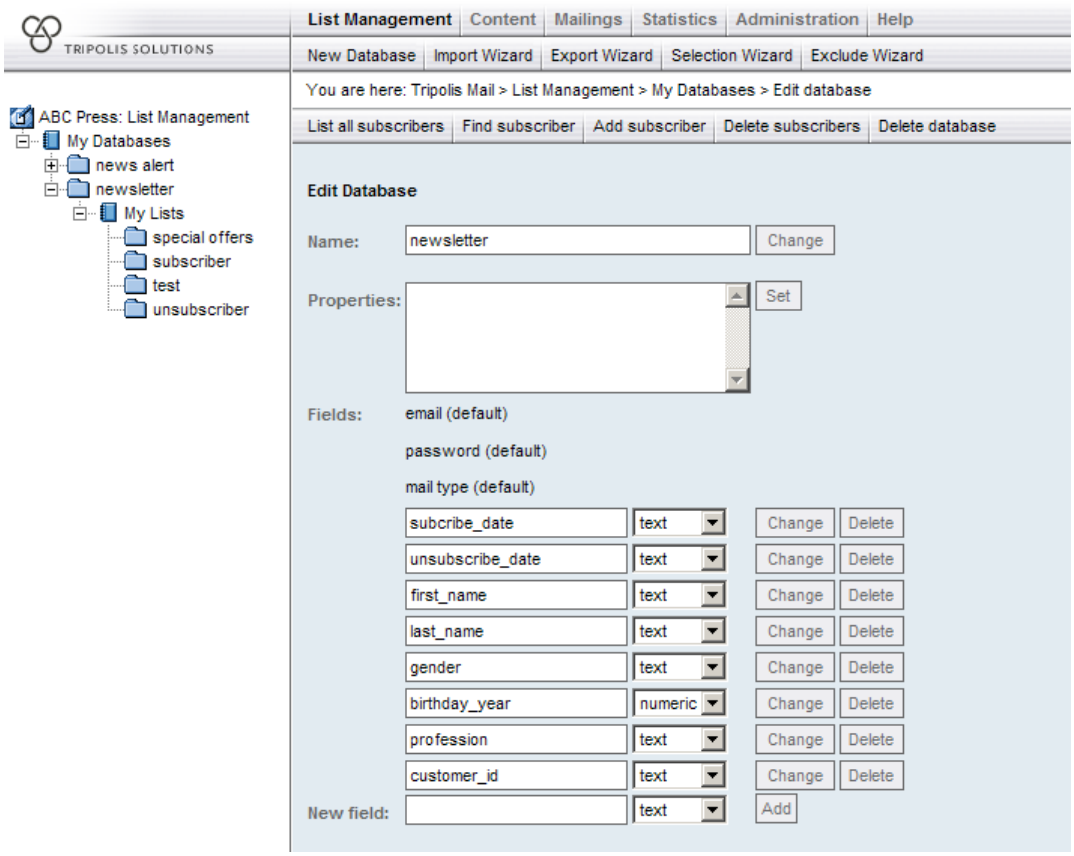
To get practical experience in these operations, you should create a test database, as described in section 3.2.2, or ensure that sample databases and lists are present in your `My Databases` container.

3.6.1 Viewing the properties of a database or a list

Many operations on a database or a list, such as retrieving, editing or deleting subscribers start from a screen that shows the properties of the database or list (the "**Database properties screen**" or "**List properties screen**"). So it's useful if you become familiar with how to access this screen.
To view the properties of a database:

1. Click the **List Management** button. Tripolis Mail displays a tree of databases in the `My Databases` container.
2. Expand the `My Databases` container and click the database you want to view. Tripolis Mail displays the properties of the database on the right side of the screen.

On this screen, you can also edit the name of the database or edit the profile fields.



To view the properties of a list:

1. Click the **List Management** button. Tripolis Mail displays a list of databases in the My Databases container.
2. Select and expand a database, and expand its `My Lists` container.
3. Click one of the lists in the `My Lists` container. Tripolis Mail displays the properties of the list on the right side of the screen.

On this screen, you can edit the name of the list if required.

Web-enabling: Veritate engineers can "web-enable" your lists, in other words your recipients can join your mailing list or cancel their subscriptions online. If a database is web-enabled you should not change the field names without first consulting Veritate.

Note about database, list and profile names: if a list or a database is web-enabled by Tripolis Mail engineers and you alter its name, it is no longer accessible from the internet.

3.6.2 Viewing the subscribers in a database

To retrieve a list of all the subscribers in a database:

1. Display the database properties as described in above.
2. Click the **List all subscribers** button on this screen. Tripolis Mail displays a list of all the subscribers in the database.

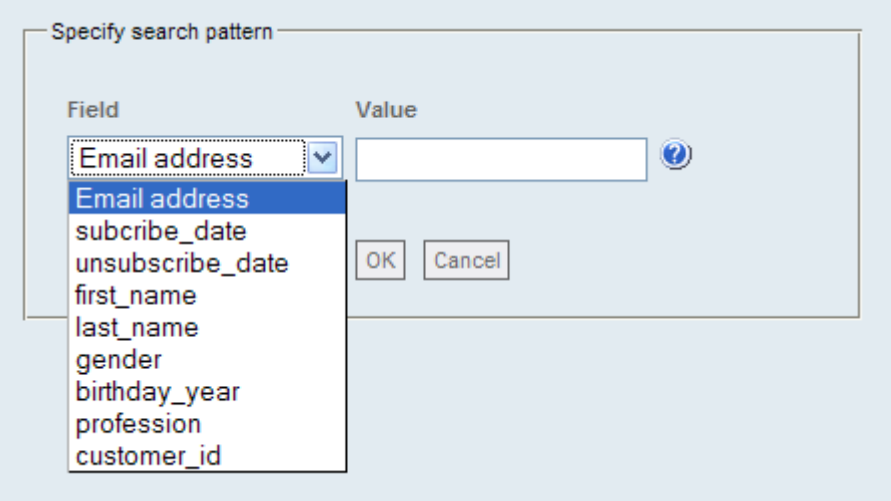
3.6.3 Viewing the subscribers in a list

To retrieve a list of all the subscribers in a list:

1. Display the list properties screen as described in above.
2. Click the **List all subscribers** button on this screen. Tripolis Mail displays a list of all the subscribers in the list.

3.6.4 Searching for subscribers

You can search for subscribers in a database and list. The procedure is as follows:
1. You display the properties screen of the database.
2. You click the **Find subscriber** button, select a database field. Available fields are the email address of the subscriber and all custom database fields. Password, mail type and status are not available as search fields.
3. Enter a search string and start the query by clicking on the **OK** button.



You find a subscriber by entering part or all of the subscriber's field value, using the `*` or `?` wildcards as required. You can also use a search string to retrieve several subscribers.

To find a subscriber by email:

1. Display the database properties screen as described in section 3.6.1 above.
2. On the properties screen, click the **Find subscriber** button.
3. In the search screen that displays, select `email address` and enter a search string and click the **OK** button. Use the `*` character (asterisk) to substitute for zero or more letters or digits. Use the `?` character to substitute for one letter or digit. For example, the string `*bert*@abcpress.com` will retrieve the following subscribers:

```
bert@abcpress.com
norbert@abcpress.com
robert@abcpress.com
roberto@abcpress.com
```

To retrieve email addresses such as `norbert@hotmail.com` or `bert@abcpress.com`, enter `*bert*@*` instead of `*bert*`. Entering `ber?@abcpress.com` will retrieve `bert@abcpress.com` only.

The @ sign must be included in the search string when searching for email addresses.
The find subscriber function is case sensitive. The system will interpret norbert@hotmail.com as another address as Norbert@hotmail.com.

If your mailing list contains a small number of subscribers, you can find the subscriber by browsing through the list – place your cursor on the list and click the **List all subscribers** button.

The **Find Subscriber** function for mailing lists can only search for email addresses.

3.6.5 Deleting subscribers

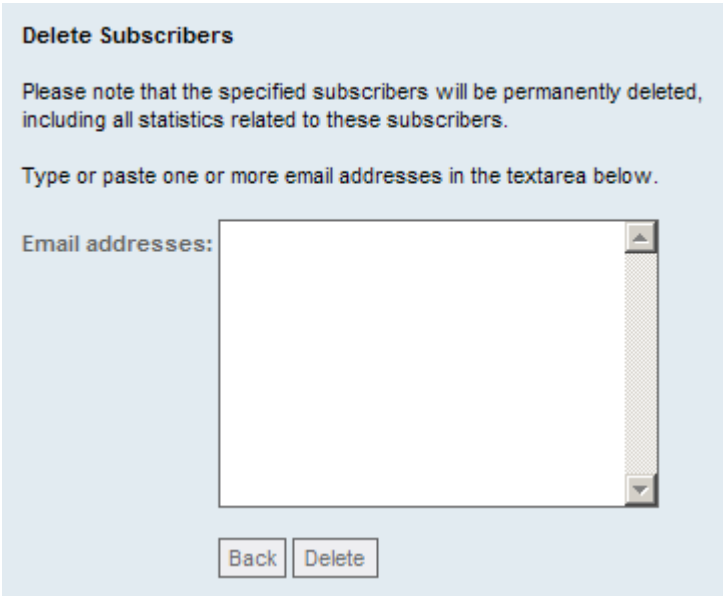
You can delete a subscriber from a list or a database. Even if you delete a subscriber from a list, the operation deletes the subscriber entirely from the *database* and from all the lists of which he is a member. You can also *remove* a subscriber from a list; in this case the subscriber remains in the database and remains a member of other lists, where applicable.

You can delete a subscriber from a database in three ways:

- Find the subscriber as described in section 3.6.4 above. In the list of subscribers that appears, place your cursor on a subscriber and click the **delete** button in the Action field.
- View a list of all the subscribers in the database as described in section 3.6.2 above. Place your cursor on a subscriber and click the **delete** button in the Action field.
- Use the **Delete subscribers** button in the database properties screen. In this case you have a list of email addresses of subscribers you want to delete. This method is described below.

To delete one or more subscribers from a database:

1. Display the database properties screen, as described in section 3.6.1 above.
2. Click the **Delete subscribers** button. The screen shown below appears.
3. Type or paste the email addresses of the subscribers you want to delete.
4. Click the **Delete** button. Tripolis Mail lists the number of subscribers that have been deleted.
5. Click the **Finish** button to stop or the **Delete More** button to repeat steps 3 and 4.


Delete Subscribers
Please note that the specified subscribers will be permanently deleted, including all statistics related to these subscribers.
Type or paste one or more email addresses in the textarea below.
Email addresses:
Back
Delete

To delete a subscriber from a list:

1. Display the list properties screen as described in section 3.6.1 above.
2. Click the **List all subscribers** button. Tripolis Mail displays a list of all the subscribers.
3. In the Action field, place your cursor on the **delete** button of the subscriber you want to delete.
4. Tripolis Mail prompts you to confirm the delete operation:

Microsoft Internet Explorer
Are you sure you want to delete subscriber mr.example@gmail.com from the database?
This will remove the subscriber from all lists belonging to the same database!
All statistics and profile data will be lost!
OK
Cancel

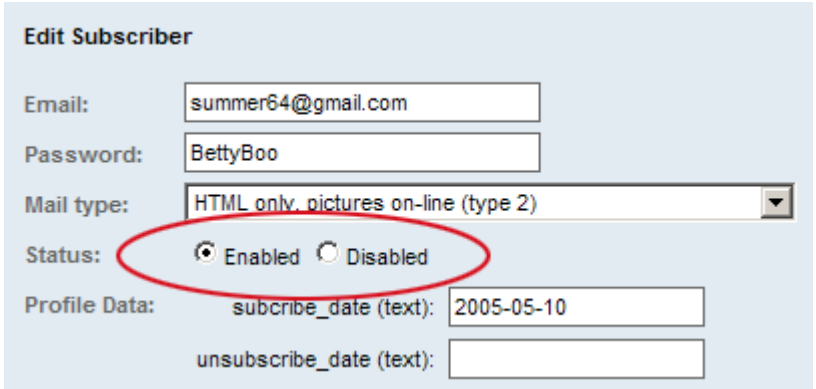
5. Click the **OK** or **Cancel** button.

To remove a subscriber from a list:

1. Display the list properties screen as described in section 3.6.1 above.
2. Click the **List all subscribers** button or click the **Find a subscriber** button and enter a search string on the search screen. Tripolis Mail displays a list of all the subscribers or displays the subscriber you are looking for.
3. In the Action field, place your cursor on the **remove** button of the subscriber you want to remove from this list.
4. Tripolis Mail prompts you to confirm the remove operation:

Microsoft Internet Explorer
Are you sure you want to remove subscriber mr.example@gmail.com from this list?
This will not delete the subscriber from the database.
OK
Cancel

3.6.6 Subscriber status



A subscriber can be enabled or disabled. When a subscriber is disabled he will not receive any e-mail via Tripolis Mail.

The subscriber is disabled when

- The subscriber did not conclude a double opt-in subscription process. Within a double opt-in process the subscriber should confirm his subscription by clicking on a link. When the subscriber does not carry out this activity the subscriber is 'disabled'.
- Tripolis Mail engineers can implement a routine (automatic bounce handling) where subscribers with a bounce registration will be disabled; the subscription will be in place but the status will change.

The only way to change the status is by changing the individual properties of a subscriber or importing a subscriber again.

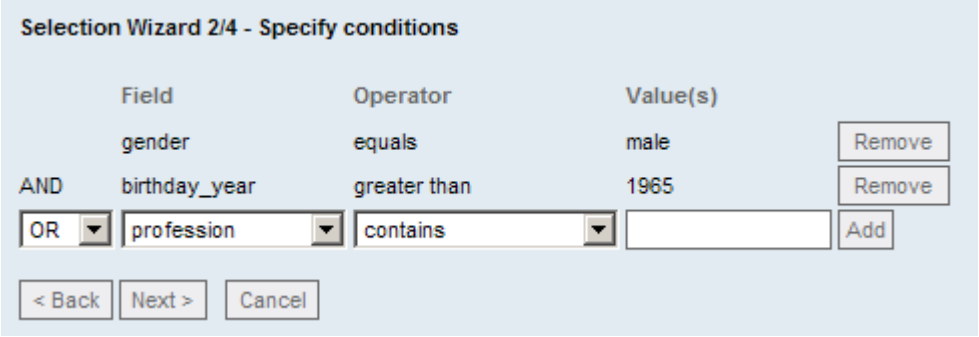
3.6.7 Selecting records from a database or list (Selection Wizard)

In addition to importing and exporting database records in Tripolis Mail, you can also make selections of records. You interrogate a database or list using selection criteria that you enter online. Tripolis Mail offers you a number of options with your results: you can save them to a new list, add them to an existing list or remove them from an existing list. This process is very useful if, for example, you want to send a mailing to a selection from your subscriber list.

To select and process records from a database or list:

1. Click the **List Management** button
2. Click the **Selection Wizard** button. This starts the selection wizard, which will guide you through the selection process.
3. **Step 1:** Select a source. Tripolis Mail asks you to select the database or mailing list from which you will make a selection. From the dropdown list, select a database or list and click the **Next** button.
4. **Step 2:** Specify the conditions. This is where you enter your query. Tripolis Mail displays a screen that contains four columns. These are as follows:
    a. a list of the fields in your database
    b. a field for an AND or OR operator (this field is displayed in the second line of a selection sequence, as shown in the example below).
    c. a list of operators (for example `equals`, `contains` or `starts with`)
    d. a Value(s) field where you enter a value.
5. Select the AND and OR operators as required (see Notes 1 and Notes 2 below). For the **Field** and **Operator** fields, click the arrow and select a field and an operator. Enter a value in the Value field. Click the **Add** button to add the line to your query. Click the **Remove** button to remove a line from your query.

    Example: imagine your mailing list contains fields for `gender`, `birthday_year` and `profession`. To select all the males born after 1995, your query screen would appear as follows:



Click the **Next** button to start the query. To stop a selection process while Tripolis Mail is processing your query, click the **Stop** button. This ensures that selections do not continue in the background.

6. **Step 3:** Tripolis Mail displays the total number of subscribers that matched your query and the number of hits per condition. The details on the first record that matched the query are also displayed.
7. Tripolis Mail now offers you four options for dealing with your results:
    i. Save the results in a new mailing list – enter the name of a new list and click the **Create new** button.
    ii. Add the results to an existing mailing list – click the arrow, select a list and click the **Add to** button.
    iii. Remove the results from an existing mailing list – click the arrow, select a list and click the **Remove from** button.
    iv. Click the **Finish** button without processing the results further.

Note 1: The AND operator is used to connect two conditions which must be true. In the example above, a subscriber must be male and be born after 1965 in order to be selected. The OR operator is used to connect two conditions, one of which must be true (both can also be true).
Note 2: the order in which you enter the query is important. That is, the conditions are evaluated in the order in which they occur, which is from top to bottom. So for example conditions 1 OR 2 AND 3 OR 4 is evaluated as: ((1 OR 2) AND 3) OR 4.
Note 3: The Value field may contain more than one value. For example, if you use the `between` operator in the case of an `age` field, the Value field would contain two values, in this case the age interval, separated by a comma or semicolon, for example `40, 45`. If you want to select two age intervals, for example 20 to 25 and 40 to 45, you must enter two lines in the query: `age between 20,25 OR age between 40,45`.
Note 4: Query strings are case sensitive.

3.6.8 Removing duplicate records from a database or a list (Exclude Wizard)

In Tripolis Mail you can compare two lists or databases with the aim of removing duplicate email addresses, that is, records with identical email addresses in the source and target lists. You select a target list and a source list. Tripolis Mail compares these and removes from the target list those records that are present in both target and source lists. Your target can also be a database, including all of its 'underlying' lists.

The Exclude Wizard has many uses, for example, you can compare a 'to be sent' mailing list with a 'sent' list and remove the 'sent' records from the 'to be sent' list.

Note: In the procedure below the term 'mailing list' covers both 'database' and 'mailing list'.

To remove duplicate email addresses:

1. Click the **List Management** button.
2. Click the **Exclude Wizard** button. This starts the exclude wizard, which guides you through the exclude process.
3. **Select a target:** Tripolis Mail prompts you to select a target mailing list. This is the list from which duplicate records will be removed. Click the **Next** button to continue.
4. **Select a source**: Tripolis Mail prompts you to select a source list or database. When you click the **Next** button, Tripolis Mail compares the lists and displays the first 10 duplicate records. Depending on the size of the mailing lists, this process can take up to two minutes.
5. To remove the duplicate records from the target list, click the **Next** button.

- If you select a list as a target, duplicate records will be removed from the list only and not from its database.
- If you select a database as a target, any duplicate records will also be removed from the database's underlying lists.
- You cannot remove duplicate email addresses by selecting the same list as both source and target.

3.6.9 Merge or split of lists

On list level Tripolis Mail enables you to *merge two lists*. The merge is only supported within a single database. Subscribers of a selected 'source list' will be added to the target list. After the merge Tripolis Mail will show you how many subscribers are added to the target list.

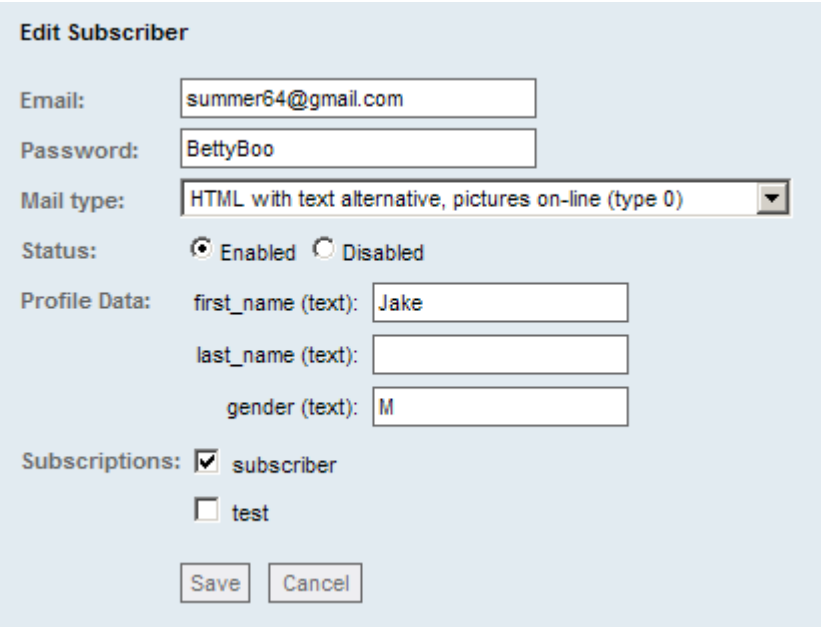
On specific list level Tripolis Mail enables you to *split one list in two separate lists.*
By entering a split position (e.g. the 5th position in a list of 10 records) and a name of the new list Tripolis Mail will process this routine.

3.6.10 Editing a subscriber's details

Once you have found a subscriber you can edit the subscriber's details or add the subscriber to a list.

1. Display the database properties screen as described in section 3.6.1 above.
2. Click the **List all subscribers** button or click the **Find a subscriber** button and enter a search string on the search screen. Tripolis Mail displays a list of all the subscribers or displays the subscriber you are looking for.
3. In the **Action** field, click the **Edit** button. The Specify subscriber properties screen is displayed.
4. Edit the data on this screen and click the **Save** button.

An example of a record from a database is shown below. In addition to the mandatory fields for email, password and mail type, the database also contains six fields that contain profile data. All the mailing lists associated with the database are listed in the Subscriptions field, and the lists of which this subscriber is a member are checked. For an overview of mail types, see section 8.1 below.



3.6.11 Adding a subscriber to a mailing list

There are two ways to add a subscriber to a mailing list:

- Import a group of subscribers into an existing list.
- Add subscribers one by one to a list. This is a quick way to create a test list wit a small number of subscribers.

The first option is explained in detail in section 3.2.1 above. The procedure for the second option is as follows:

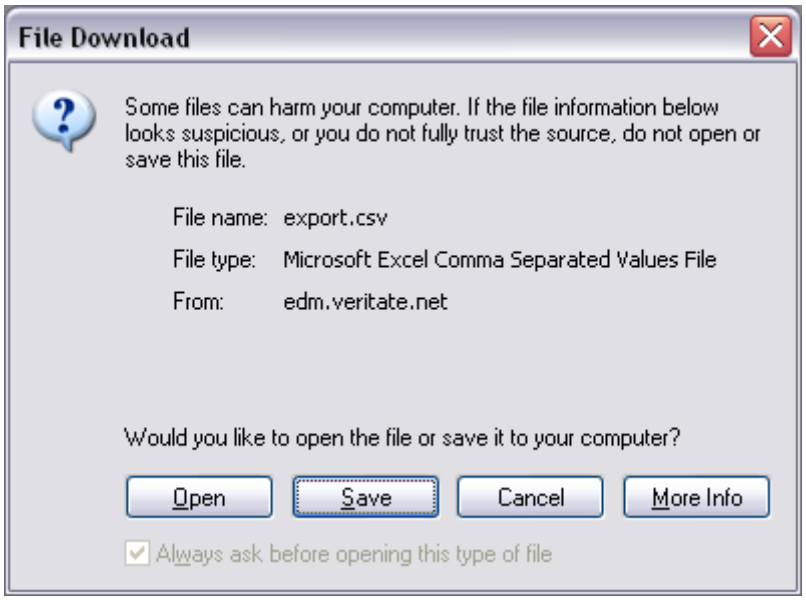
1. Expand the + icon next to the `My Databases` container.
2. Expand the + icon next to the database that contains the list you want to edit.
3. Click the list you want to edit.
4. Click the **Add subscriber** button.
5. In the screen that appears, enter the email address, password, mail type and profile data (for an overview of mail types, see section 8.1 below).
6. Enrol the subscriber in other mailing lists associated with the database (the list you selected is already checked by default).

3.6.12 Exporting subscribers (Export Wizard)

You can export a list as a CSV file and edit it in a text editor such as Microsoft's Notepad or import it into Microsoft's Access or Excel applications. For an overview of CSV files, see section 3.1.2 above.

The procedure is as follows:

1. Click the **List Management** button
2. Click the **Export Wizard** button. This starts the export wizard, which will guide you through the export process.
3. **Step 1:** from the database dropdown list, choose the database that contains the mailing list you want to export and click the **Next** button.
4. **Step 2:** from the mailing list dropdown list, choose the mailing list you want to export and click the **Next** button.
5. **Step 3:** click the **Download** button. The following screen appears. Note that the second option (Save this file to disk) is automatically selected.


File Download
Some files can harm your computer. If the file information below looks suspicious, or you do not fully trust the source, do not open or save this file.
File name: export.csv
File type: Microsoft Excel Comma Separated Values File
From: edm.veritate.net
Would you like to open the file or save it to your computer?
Open
Save
Cancel
More Info
Always ask before opening this type of file

6. Click **OK**, enter a file name in the **Save As** dialog that appears, and click the **Save** button.

> A Tripolis Mail database will probably change continuously if subscribers enrol in a mailing list or cancel their subscriptions online. If you export a mailing list and then import it again, you may inadvertently import subscribers that cancelled their subscriptions in the period between export and import.

3.6.13 Importing a Veritate CSV file into Microsoft Access or Microsoft Excel

If you export a CSV file from Tripolis Mail (how to do this is described in section 3.6.12 above), you can import it into Microsoft's Access or Excel applications. Similarly, if you create a database table or a spreadsheet file in these applications you can save the file in CSV format and import it into Tripolis Mail. The following sections describe how to import a CSV file into MS-Access and MS-Excel. For additional information, consult the help file for these applications.

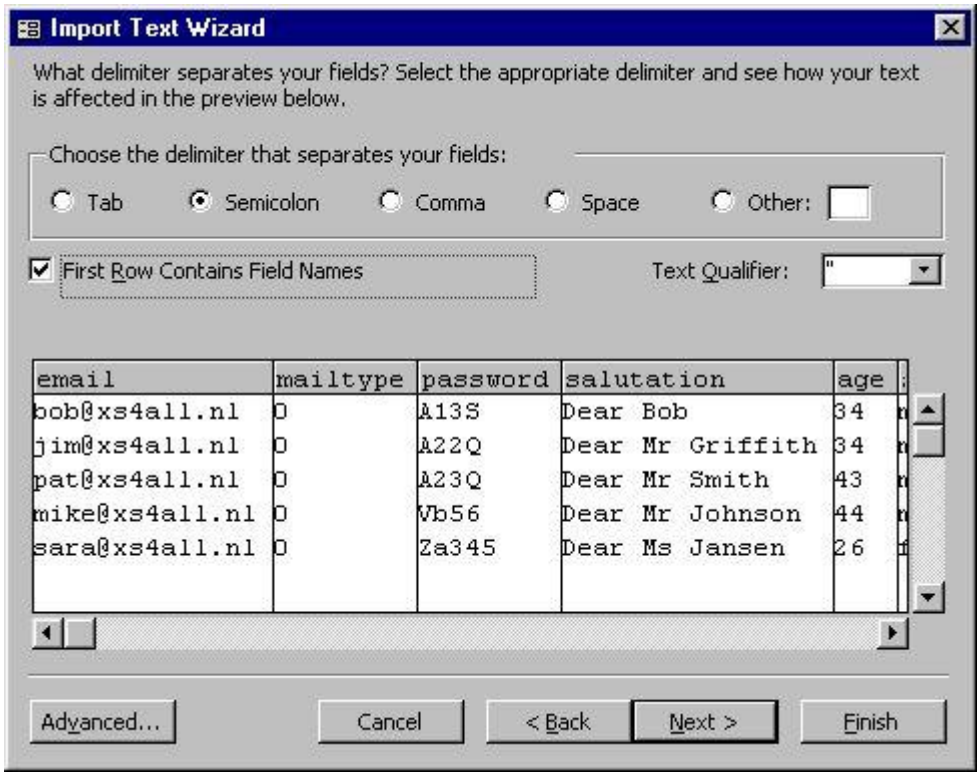
3.6.13.1 Importing a CSV file into MS-Access

1. Start Microsoft Access (hereafter called 'MS-Access').
2. If MS-Access prompts you in the opening dialog to create a new database (Blank Access database), choose this option or click the icon from the toolbar.

3. Enter the name of a database file in the **File New Database** dialog and click the **Create** button. The database table you create from the CSV file will be stored in this database.
4. From the toolbar, choose **File > Get External Data > Import**.
5. In the Import dialog, navigate to the CSV file you want to import (select Text Files in the **Files of type** field) and click the **Import** button. MS-Access now starts the Import Text Wizard. At each stage below, click the **Next** button to go to the next step.
    a. Click the Delimited checkbox **on**.
    b. Select a semicolon as field delimiter and click the **First Row contains Field Names** checkbox **on**. The names in the header row of the CSV file are then used to create the field names in the database.
    c. Create a new table: select **New Table**.
    d. For each column in the CSV file you are importing, the wizard prompts you to make the following choices:
        i. Enter a new field name or use the default from the header row.
        ii. Skip the column (do not import).
        iii. Select a data type.
        iv. Index the field.

    Place your cursor on each column and modify its properties as required.

6. Click the **Choose my primary key** radio button on and select the **email** column or the column you used in Tripolis Mail as the primary key. This is the field that uniquely identifies each record in the database.
7. Enter the name of the database table you will create and click the **Finish** button. The database table you just created is shown in the database screen.

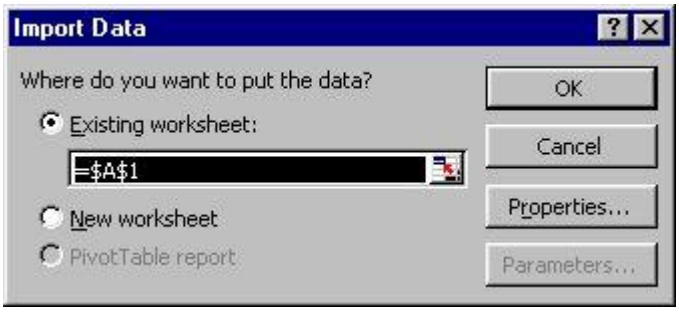

Import Text Wizard
What delimiter separates your fields? Select the appropriate delimiter and see how your text is affected in the preview below.
Choose the delimiter that separates your fields:
Tab
Semicolon
Comma
Space
Other:
First Row Contains Field Names
Text Qualifier:
email mailtype password salutation age
bob@xs4all.nl 0 A13S Dear Bob 34
jim@xs4all.nl 0 A22Q Dear Mr Griffith 34
pat@xs4all.nl 0 A23Q Dear Mr Smith 43
mike@xs4all.nl 0 Vb56 Dear Mr Johnson 44
sara@xs4all.nl 0 Za345 Dear Ms Jansen 26
Advanced...
Cancel
< Back
Next >
Finish

3.6.13.2 Importing a CSV file into MS-Excel

1. Start Microsoft Excel (hereafter called 'MS-Excel').
2. Click the icon from the toolbar to create a new empty Excel document. Alternatively, open an existing Excel document.
3. From the toolbar, choose **Data > Get External Data > Import Text File**.

4. In the **Import Text File** dialog that appears, navigate to the CSV file you want to import (select All Files in the **Files of type** list). MS-Excel now starts the Excel Text Import Wizard. At each stage below, click the **Next** button to go to the next step.
    a. Choose **Delimited** as a file type and row 1 (default) as the first row to import.
    b. Click the Semicolon checkbox **on** to indicate the delimiter.
    c. For each column in the CSV file you are importing, the wizard prompts you to make the following choices:
        i. Select the column data format.
        ii. Skip the column (do not import).
        Place your cursor on each column and modify its properties as required.

    The wizard now prompts you to specify the destination of the import data and its location on the worksheet. Select the current worksheet or a new worksheet, and enter the column-row specification (e.g. `$D$8` within the worksheet file. The first cell of data (row 1, column 1) will be inserted at the location you specify.



    Click **OK**. MS-Excel now imports the CSV file.
5. Click the icon on the toolbar to save the worksheet file.

4 Content Management

4.1 Overview

The Content section is the module where you create and manage the content of your newsletters, and the template from which the newsletters are derived. You manage content in Tripolis Mail at two levels: the e-zine level and the edition level. At e-zine level you enter static information that does not change from edition to edition, for example the 'from' email address, a default subject for the email, and an email address to which undeliverable emails are bounced. You also specify the template that you will use to create the editions that are made from this e-zine. You must create the e-zine before you start to create its editions, and because e-zine information does not often change, it's an operation that takes place only occasionally.

At edition level you enter the actual content of a mailing. You enter text, graphics and hyperlinks. Depending on the template you use, the mailing you send to recipients will be formatted as HTML or plain text or both. You usually create an edition frequently, for example every week or month.

4.2 Navigating through the content module

This section describes how to navigate through the content section. You should read it before attempting to create e-zines and editions. You may not require all the features described, but you should browse through it to gain some idea of the features before attempting the real thing.

For step-by-step descriptions on how to create an e-zine and an edition using each type of template, see section 4.3 below.

Click **Content** from the **Main Menu**. You navigate through content using the tree structure on the left side of the screen and the buttons on the right side. When you create an e-zine and a set of corresponding editions, they are displayed in a tree structure similar to the example on the left. Note that each e-zine contains a **`My Editions`** container, which expands to display the editions created from the e-zine.

In the screen above, the e-zine named `newsletter` contains an edition named `2004-06-16`. You navigate through e-zines and editions by clicking the `+` and `–` icons to expand or collapse the folders or containers.

You can also view the properties of e-zines and editions. Place you cursor on an e-zine and click once. The e-zine properties screen is displayed on the right side of the screen. This screen is discussed in detail in section 4.3.2 below. To view the properties of an edition, expand the relevant `My Editions` container and then click the edition you want to view. The edition properties screen is then displayed. For more information on the fields in this screen, see section 4.3.3 below

4.2.1 About Templates

The aim of a template in Tripolis Mail is to make the process of creating a newsletter as simple and efficient as possible. A template separates content from structure, in other words the template allows you to create editions without requiring a detailed knowledge of the technical details, for example HTML coding. In most cases you will design your template together with the Veritate engineer, and you will receive full instructions on its use.

A template is structured because you enter content in predefined areas. You can also move blocks of content up and down within a specific part of the edition you are creating, in some cases you can

insert internal links or automatically allow a table of contents to be generated, and you can delete blocks of content. The result of your input is formatted in HTML or text format or both.

Some parts of a template, for example a newsletter's title, are not editable by an author – when you create the template with a Veritate engineer you decide on these aspects. You enter content in the parts that change from edition to edition, and the template is designed to allow you to do this easily and quickly. A template may have word processing functions – these can be relatively simple (CMS template) or more advanced (Visual Editor template).

If you are skilled in HTML coding and have a good knowledge of the template you are using, you can edit a version of the template and load it into Tripolis Mail. How to do this is described in section 4.2.4 below.

Where is a template defined for an e-zine? You select a template type when you create the e-zine and define its other properties.

How many types of template are there?
Three types of template are currently available. These are outlined below.

Name	Notes
Content Management System (CMS)	Used for entering data quickly and frequently. This template can automatically generate a table of contents from the content headers, and a text version from a HTML version you have created. Templates are available for HTML and text versions. Basic word processing and layout functions are available.
Visual Editor (VE)	Contains a more advanced word processing interface than a CMS template. Contains functions for temporarily hiding text and inserting internal links. No automatic generation of text version from HTML version.
Static HTML	You edit the text or HTML version (no editor used); extensive HTML coding skills required.

You can use Tripolis Mail templates for the Visual Editor only with Microsoft Internet Explorer for Windows, version 5.5 or above. CMS templates are compatible with Firefox as well.
Text that you "copy and paste" from Microsoft Word into the Content Management System or the Visual Editor might lead to formatting problems on the web page. To avoid this, first paste your text into a simple text editor such as Notepad or type the text in Notepad before you copy it into the edition. The article editor of the Content Management System offers special copy & paste filters to avoid these formatting problems.

4.2.2 CMS template

A Content Management System (CMS) template is a structured container and interface for entering text, graphics or hyperlinks in an edition. Its configuration is already fixed – you enter content into areas (sections and articles) that have a predefined structure. You don't view or manipulate HTML code, but the result of your labours is an edition in both HTML and text format. Your CMS template is built from a series of sections, which you can edit. The structure is tailor-made to your requirements, in collaboration with a Veritate engineer. A CMS template can generate a table of contents from the articles you enter in the edition. You can also delete articles and change an article's location within a section. For more information on creating a newsletter using a CMS template, see section 4.3.3.1 below.

4.2.3 Visual Editor template

The Visual Editor is a web-based WYSIWYG editing interface for articles. Like the CMS, the Visual Editor also uses predefined areas for entering content.

- You can change an article's location within a section, delete articles and make articles (temporarily) invisible.
- While editing the HTML version of an edition, you can preview it and save the page, or revert to the last saved version. For the text version you can preview the text only. You can export both HTML and text versions.
- You can insert internal links to articles in an edition. This is a useful way to create a table of contents.
- The VE template does not generate a text version of an edition from the HTML version. This is only possible with CMS templates.
- A template for a text edition is not available.
- For each edition you create, you can specify which URLs in the edition you want to include in click tracking.

4.2.4 Static HTML Template

The CMS and Visual Editor templates are designed for authors to create content conveniently and without any knowledge of HTML code. You can also modify a template file if you have required skills, that is, a very good knowledge of the template structure and of HTML code. Each time you create a new edition, the template is loaded.

4.2.5 Counters – recording subscriber reactions to your emails

One of Tripolis Mail's most valuable features is its ability to record subscribers' reactions to your email. Here 'reactions' refers to the click and open operations of your subscribers, that is, you can find answers to questions such as "which hyperlinks in my email did the subscribers click?" and "how often did subscribers open my email?" To gather this type of information, you can include "click counters" in the HTML and text versions of your email, and "open counters" in the HTML version of your email.

Click counters: a click counter records statistics on recipients' reactions to hyperlinks in your email, for example the number of times a recipient clicked a hyperlink in your mailing.

In a CMS template, you can automatically record the number of clicks for all the hyperlinks included in your email. In a Visual Editor template, you select the links you want to record at edition level by clicking the **Manage click counters** button in the **Edit edition: Specify edition properties** screen.

For each URL in the mailing, the click counter enters an encrypted address, which refers to the 'real' URL and also records the subscriber's click to the URL. The 'real' URL is opened normally.

On the **Click counter properties** page you can enter a name for the counter, edit the URL of the target link and mark a link as *special*. This is helpful to separate special links like an unsubscribe link from links which belong to a campaign when statistics are being analysed. A click counter can also be assigned to a Click Channel (see 6.3).

Open counters: an open counter records the frequency of email open operations ("open tracking"), per subscriber and per mailing. You set the open counter to "on" at edition level by clicking the **Add open counter** button in the **Edit edition: Specify edition properties screen.**

Test all counters before you use them on a live subscriber list. To do this, use the Test option in the Mailings section (see section 5 below). When you open a test email in your email application's inbox, click all the links for which a counter has been set. Then view the results in the Statistics module (see section 6 below). Tripolis Mail does not guarantee the correct operation of counters where these are used in combination with non Tripolis Mail counters, for example counters from DoubleClick. The Tripolis Mail counters will function correctly but the DoubleClick counters may not function correctly.

4.3 Creating a newsletter

The following section describes how to create a newsletter in Tripolis Mail. First ensure that you are familiar with the templates used in Tripolis Mail, described in section 4.2.1 above.

The steps are as follows:

1. Choose the template you intend to use and design its structure.
2. Create an e-zine.
3. Create an edition associated with the e-zine.
4. Edit and preview the edition.

You will probably perform steps 1 and 2 above once only, in association with a Veritate engineer.

4.3.1 Step 1 – Choose and design a template type

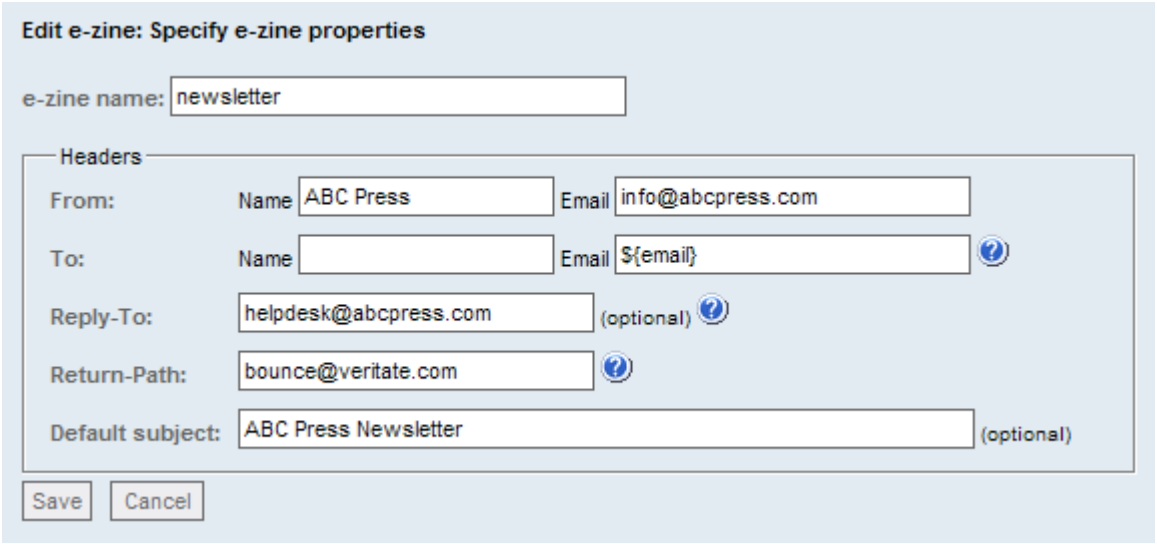
Together with a Veritate project manager you will examine your requirements and design the structure of your newsletters. For example, will you need short businesslike topics without any frills, or do you want lots of images to create a visually attractive newsletter? How many areas (sections) will be contained in your newsletter? These are some of the issues you will consider.

4.3.2 Step 2 – Create an e-zine

Click **Content** from the opening screen and then click the **New e-zine** button. An e-zine properties screen similar to the one shown below is displayed. On this screen you select the templates used to create editions in HTML and text format, and you enter data that does not change for each edition, for example the Reply-To email address. In the illustration below, the e-zine properties of a newsletter named `Newsletter` are shown. The fields in the e-zine property screen are described in the table below. Enter your data on this screen and then click the **Save** button (see below).

Headers: In this section you enter data that will be used for the email's `From`, `To` and `Subject` fields, in the `Reply-To` email address and the address to which bounced emails will be forwarded (`Return-Path`).

	Field	Used for	Example
	Name	The name of the e-zine. This name is used within Tripolis Mail only and is not visible to the subscriber.	"Weekly Newsletter"
HEADERS	**From Name**	The name that will appear in the "From" field of the recipient's email.	"Our Weekly Newsletter"
	From Email	The email address from which the email appears to come from.	info@veritate.com editor@mycompany.com
	To Name	The name that appears in the mail-to field.	Subscriber
	To Email	The email address that appears in the mail-to field.	${email} This code resolves to the email address of each subscriber. For more information on personalising emails, see section 5.2.1 below.
	Reply-To	The address that appears in the subscriber's to field if the subscriber replies to the email. If a value is not present in this field, the value in the From Email field above is used as the reply-to address.	
	Return-Path	The address to which undeliverable emails are bounced. The default value is bounce@veritate.com. If you intend to use the Tripolis Mail handler to process undeliverable emails, enter bounce@veritate.com here. If you wish to handle undeliverable email internally, enter the relevant address, for example bounce@mycompany.com. You can also arrange to forward mail from bounce@mycompany.com to bounce@veritate.com	
	Default subject	A name or topic used as default subject for the edition, for example ABC Press Newsletter. You can also enter a subject in the **Subject** field of the edition properties screen.	



Advanced Options

The information in the section below is informative only. Most probably, a Veritate engineer will select or enter the data, so normally you won't need to adjust values in these fields.

Templates: this section defines the templates that will be used for the HTML and Text versions of your newsletter.

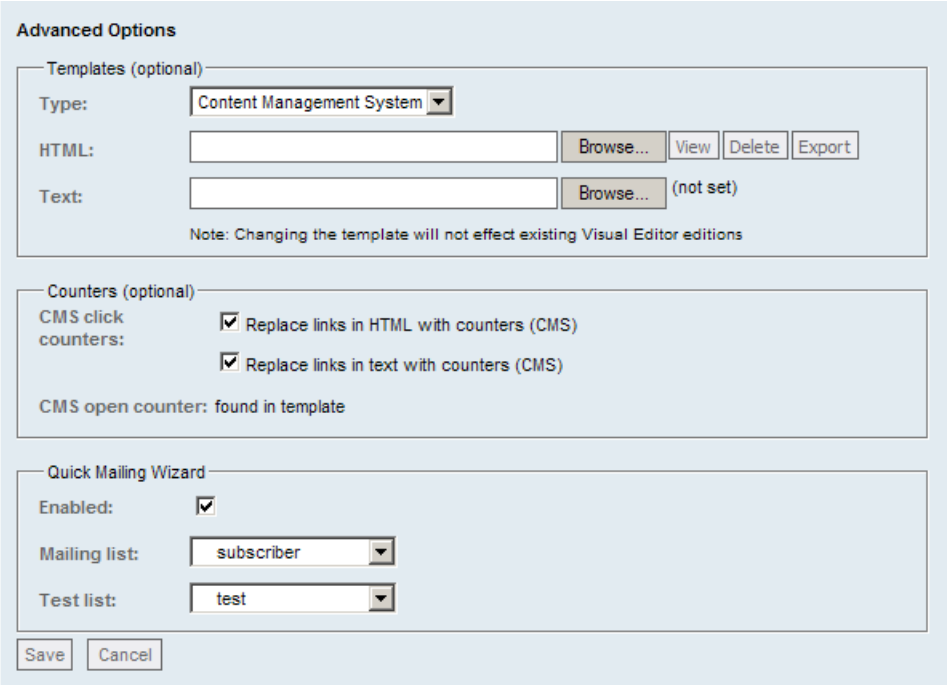
	Field	Description	Example
TEMPLATES	**Type**	Specifies the type of template you will use to create editions. For an overview of templates, see section 4.2.1 above.	- Content Management System - Visual Editor
	HTML **Text**	To select a template, click the **Browse** button, navigate to the file you want to use as a template and click the **Open** button in the dialog. If a template is selected, a value is not displayed in each of these fields and the **View**, **Delete** and **Export** buttons are displayed.	

Character set: here you can specify the character set encoding of the newsletter. The default value is Western European (Latin 1), which is the best choice for western European languages like English, German, Dutch or French. The chosen character set is being supported for CMS and static editions.

Counters: this section specifies the URL addresses of open and click counters. For an overview of counters, see section 4.2.5 above.

Field	Description
CMS click counters: Replace links in HTML with counters (CMS). Replace links in text with counters (CMS)	Click these check boxes **on** if you selected a CMS template and want to use click tracking on the hyperlinks in the HTML or text versions of your email. If you selected a Visual Editor template, you select the URLs you want to track in the **Edit edition – Specify edition properties** screen (see section 4.3.3.2 below).

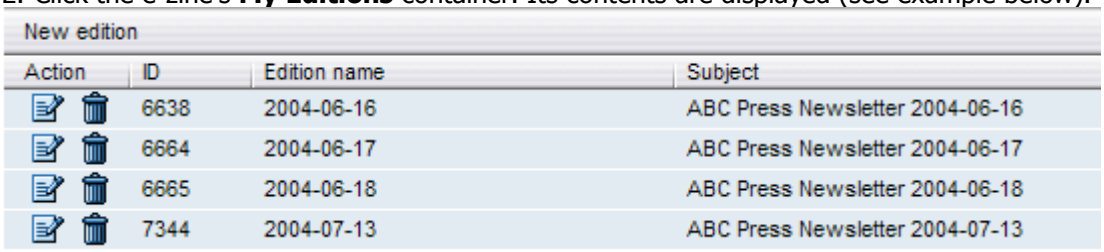
Quick Mailing Wizard: if the e-zines is always being sent to the same mailing list and test list, you can use the Quick Mailing Wizard. Check enabled and select a mailing as well as a test list. Now this e-zine will be available in the Quick Mailing Wizard and the mailings lists are automatically being selected.



Manage sections (only available for CMS templates)
Click this button to view a list of the CMS sections that make up the e-zine.

4.3.3 Step 3 – Create an edition

To create an edition:
1. Ensure that an e-zine exists for the edition you want to create. For information on creating an e-zine, see section 4.3.2 above.
2. Click the e-zine's **My Editions** container. Its contents are displayed (see example below).



The next step depends of the type of template you selected when you created the e-zine (see section 4.3.2 above). Below, we'll consider the options for a CMS template, a Visual Editor template and a Static HTML template.

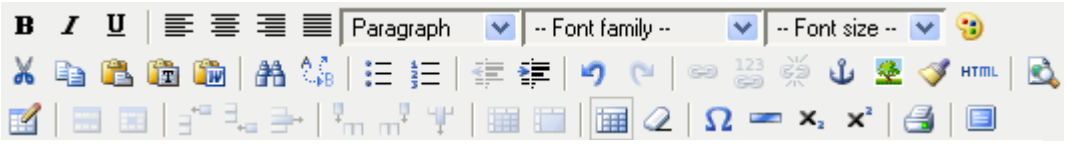
4.3.3.1 Creating a newsletter using a CMS template

Starting point: you have created and specified values for an e-zine with a CMS type template.

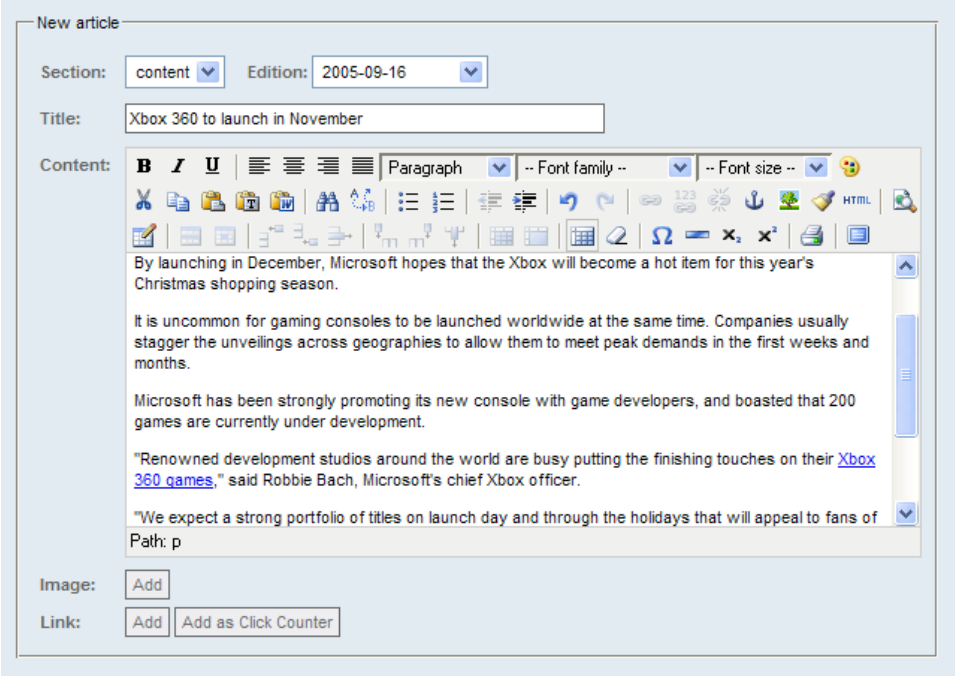
1. Select the e-zine and click its `My Editions` container.
2. Click the **New edition** button on the right side of the screen. A **New edition – Specify edition properties** screen appears. This is where you enter the properties of the new edition, including a specific subject for this edition, for example `ABC Press Newsletter 2004-07-13`.
3. Enter a Name and a Subject for the new edition and click the **Save** button. You will now enter articles for this edition.

4. A list of editions, including the edition you just created, appears on the following screen. Click the **Edit** button of the edition you just created. The **Edit edition: Specify edition properties** screen appears.
5. Click the **Articles** button on this screen and then click the **New Article** button on the following screen. The edit interface for the articles in your edition appears. Note that the edition you just created is displayed as the default in the Edition field of the editor, but you can select another edition if required.

Icons and functions of the CMS editor:

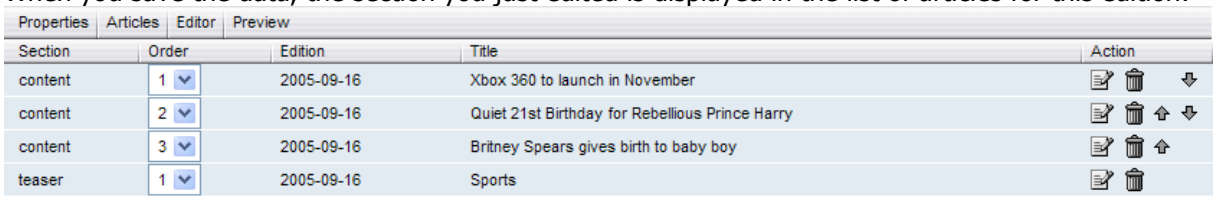


To perform most of the above operations, first select the text you want to change and click the relevant icon. The image above shows the advanced mode of the CMS editor with all available functions. A basic mode with less functions is also available. The mode can be changed on the user settings page of the Administration section.
When you click the insert image icon, an Insert Image screen is displayed. On this screen you can select an image from the server or upload new images. The screen also allows you to edit some of the image's properties: its dimensions or alignment, a name that is displayed on mousover, or a border. Click the Insert in content button to insert the image into the Content field of the article


New article
Section:
content
Edition:
2005-09-16
Title:
Xbox 360 to launch in November
Content:
Paragraph
-- Font family --
-- Font size --
HTML
By launching in December, Microsoft hopes that the Xbox will become a hot item for this year's Christmas shopping season.
It is uncommon for gaming consoles to be launched worldwide at the same time. Companies usually stagger the unveilings across geographies to allow them to meet peak demands in the first weeks and months.
Microsoft has been strongly promoting its new console with game developers, and boasted that 200 games are currently under development.
"Renowned development studios around the world are busy putting the finishing touches on their Xbox 360 games," said Robbie Bach, Microsoft's chief Xbox officer.
"We expect a strong portfolio of titles on launch day and through the holidays that will appeal to fans of
Path: p
Image:
Add
Link:
Add
Add as Click Counter

6. Enter text, images and hyperlinks as required. Click the **Save** button when you are finished. Tripolis Mail now displays the article you just created. The example below shows a series of articles created for a newsletter. You can edit or delete an article by clicking the or icons.
7. To add another article to the edition, click the **New article** button. The editing interface appears. Enter a new article and save your content. The new article is displayed under the previous article, on a screen similar to the one shown below. In some cases – this depends on the design of your template and on the number of articles in a section – you can move articles up or down within a section using the or arrows in the *Action* field or directly select the position in the *Order* field.

When you save the data, the section you just edited is displayed in the list of articles for this edition:



Editing a group of articles in one operation
When you have created a series of articles, you can edit these from an Editor screen. To do this, first display the **Edit edition: Specify edition properties** screen for the edition, and click the **Editor** button. Using the editor interface that appears (see example below), use the icon or icons to edit or delete articles. Use the or arrows, where these are present, to move an article up or down within its section.

ABC PRESS
Newsletter
In this Issue
Dollar shakes off prospect of gradual hike in US interest rates
OPEC to Ask Oil Producers to Boost Output
A Thousand Show Up for Clinton Film Debut
Sport
Science

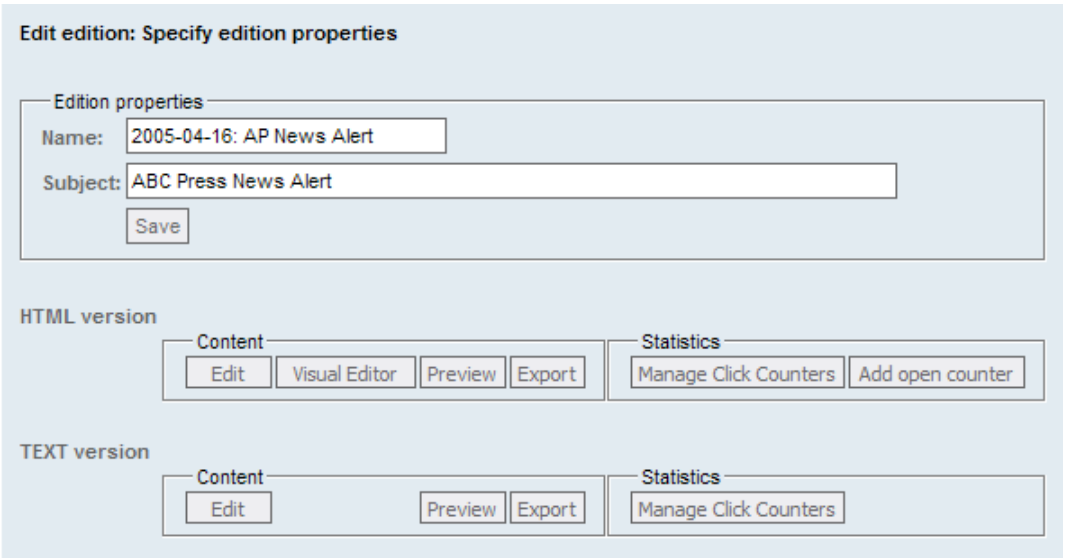
Previewing your content
To preview and test (internal) links in the edition, click the **Preview** button in the **Edit edition: Specify edition properties** screen. Tripolis Mail displays the content of the `From`, `To` and `Subject` fields, and a view of the edition in HTML and Text format.

4.3.3.2 Creating a newsletter using a Visual Editor template

Starting point: you have created an e-zine with a Visual Editor type template. You have entered appropriate values in the e-zines properties screen.

If you create a HTML version of an edition with the Visual Editor, Tripolis Mail will not automatically create a text version of the same edition. You must author content for both formats.

1. Select the e-zine, click its `My Editions` container and click the **New edition** button on the right side of the screen.
2. Enter a name for the edition in the **Name** field and a value in the **Subject** field.
3. Click the **Save** button. In the list of editions that appears, click the **edit** button of the edition you just created. The **Edit edition – Specify edition properties** screen appears (see below).



This screen allows you to edit the HTML and Text versions of the edition. In the HTML version you use the Visual Editor in the **Visual Editor** screen; in the text version you edit the text in an **Edit Text version** screen. The function of each button is described below.

HTML version

Button	Function
Edit	Edit the page, that is, edit the structure derived from the template that will be used to create the current edition. You shouldn't do this unless you have excellent HTML coding skills and a good knowledge of the Visual Editor template designed for your company.
Visual Editor	Edit and preview the page in the Visual Editor. See step 4 below
Preview	Preview the edition (no editing functions). Tripolis Mail opens a separate window with a representation of the HTML version of the edition.
Export	Export the page in HTML format. Tripolis Mail prompts you for a download location. Click the **Save** button, navigate to the location and click the **Save** button again. The exported file can be used as static html file on your website, but should not be imported back into Tripolis Mail. If you want to edit the HTML of an edition use the **Edit** button instead.
Manage click counters	Displays a list of all the links included in the edition and allows you to select links to include in click tracking. Click the appropriate link checkbox **on** and click the **Save** button.
Add open counter	When you click this button, the default Veritate counter or the counter specified in the e-zine (Open URL field) is added to the edition. This button is greyed if the open counter is has already been added to the edition.

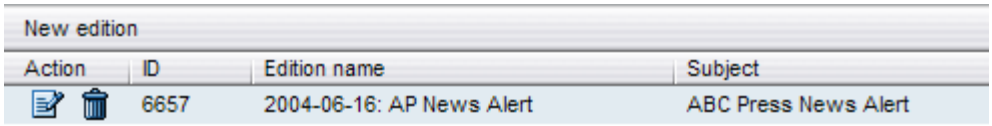
Text version

Button	Function
Edit	Edit a text version of the page in a text editor.
Preview	Preview the edition (no editing functions). Tripolis Mail opens a separate window that displays a representation of the text version of the edition.
Export	Export the page as a text file. Tripolis Mail prompts you for a download location. Click the **Save** button, navigate to the location and click the **Save** button again.
Manage click counters	Displays a list of all the links included in the edition and allows you to select links to include in click tracking. Click the appropriate link checkbox **on** and click the **Save** button.

4. Click the **Visual Editor** button. The Visual Editor template appears.
5. Click the **Edit** button at the top left side of the screen. The Visual Editor appears. This is the editing interface for the articles you will include in the edition. Section 4.2.3 contains a detailed overview of the Visual Editor.
6. When you are finished entering content, click the **Preview** button to get a view of the page, as it will appear to your recipients. If you are satisfied with its contents, click the **Save** button. Click the **Revert** button to return to the last saved version of the page. Click the **Cancel** button to return to the **Edit edition – Specify edition properties** screen.

4.3.3.3 Using a Visual Editor

The above characteristics are best illustrated by an example. We will consider the newsletter of a news agency. Imagine you have created an e-zine with a Visual Editor type template. You have also set up the properties of the first edition. When you are ready to enter the first article in this edition, a screen similar to the one shown below is displayed:



When you click the **Edit** icon on your edition, the edit screen appears.

To access and edit the edition using the Visual Editor, click the **Visual Editor** button. The editing interface appears, as shown in the example below. Note the **Edit** and **Cancel** buttons on the top left side of the screen.

To edit the edition in the Visual Editor, click the **Edit** button on the left side of the screen.

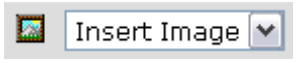
Visual Editor
Edit
Preview
Revert
Cancel
Style
Font
Size
Insert Image
Image align
Homepage
Change profile
Unsubscribe
Contact
$date.getDate("d MMMM yyyy")
ABC PRESS
News Alert
article
New Attack on Oil Pipeline in Iraq
[AP, Wed Jun 16] BAGHDAD, Iraq - Saboteurs blasted a key pipeline Wednesday for the second time in as many days, halting all oil exports from Iraq (news - web sites), officials said. Gunmen killed the top security official of the state-run Northern Oil company as insurgents stepped up attacks on Iraq's infrastructure.
The Wednesday attack north of the town of Faw crippled two already damaged pipelines

Note the following features of the Visual Editor:

Structure: the page is divided into sections, identified by a name or a label, for example `artikel1`, each of which contain one or more articles. Note that if you copy an article, the copy retains the name of the section (this is the standard method of creating a new article in the VE). At the top of the page an editing interface allows you to perform word processing operations. The icons on this editor are similar in function to those in MS-Word. Each icon has a tool tip, which is visible when you move your cursor over the icon.

Note the **Insert image** and **Image align** dropdown lists – these allow you to insert an image you have already loaded, and align its position (see Images below).
Images: in the Visual Editor you can insert images in two ways: (i) insert an image selected from a drop down menu into a section designed to contain images only, or (ii) insert an image into other sections not specifically designed for images. You can retrieve the image from your hard drive, from the network or you can use a preloaded image. In case (ii) you can also optionally make the image clickable – the user clicks the image to view a target web page that you specify.

How to upload an image:



Nieuw bestand toevoegen - Microsoft I...
Add new image for this edition
Click on the 'browser' button and select
a file on your computer.
Next click on 'Add image file'
Browse...
Add image file
cancel

1. Place your cursor in the article where you want to insert the image and click the frame icon.
2. In the screen that appears (see below left), navigate to the file you want to load.
3. Click the **Add image file** button. The image is inserted at your cursor position. To align the image, select it and choose a position from the Image align dropdown list.

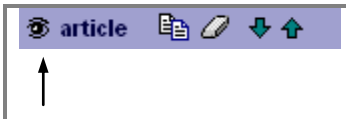
The image you just loaded is also added to the list in the **Insert Image** dropdown list. This allows you to insert the image at another location. To do this, place your cursor at the preferred location, click the arrow next to the **Insert Image** dropdown list and select the image.

Using images as links: an image that you insert into a section (see case (ii) above) can be used as a "clickable image" to another document (web page). You can use this as an alternative to text links. To do this, insert the image as described in case (ii) above. Select the image (place your cursor on the image) and click the icon in the Visual Editor toolbar. In the Hyperlink screen that appears, enter a URL and click the **OK** button. Test your result by clicking the **Preview** button and clicking the image. You cannot perform this operation on preloaded images.

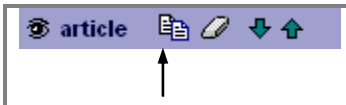
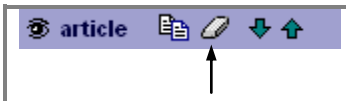
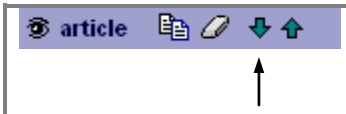
Creating hyperlinks: to connect a hyperlink to a text , first select the text you want to use and then click the icon on the Visual Editor toolbar. In the Hyperlink screen that appears, enter the URL and click the **OK** button. Test your result by clicking the **Preview** button and clicking the text.

4.3.3.4 Icons used in the Visual Editor

In the Visual Editor, a set of icons allows you to hide, copy or delete articles, or to move an article up and down within its section. The examples below refer to an article of section `'article'`.



Hide an article: use the 'eye' to (temporarily) hide an *article*. To hide the article, click the eye once. A red cross appears across the eye. To make the article visible, click the eye again.

	*Copy an article:* click the copy icon shown on the left indicates that the article can be copied. When you click this icon, the entire contents of the article are copied. Enter text in the new article and move it to a new location on the screen if required.
	*Delete an article:* click the erase icon.
	*Move an article*: click the up or down arrows to move an article's position up or down within its section. These arrows may or may not be displayed, depending on the number of articles per section.

4.3.3.5 Inserting internal links

You can also create internal links, for example from the top of your edition to an article. When the recipient views the edition, he can click the internal link from the "Table of Contents" to the article.

To insert an internal link on a page:

1. Locate the target position for an anchor. The anchor will be the target for your internal link. Type the identifier, which has to start with a # character and must be enclosed in square brackets, for example [#3]. This anchor remains visible in the editor but not in the final newsletter.
2. Select the text where you want to add your internal link and click the icon (set link icon).
3. In the Hyperlink screen that appears, type the identifier of the anchor you have just entered, without the brackets, for example #3 and click **OK**. Test your result by clicking the **Preview** button and clicking the hyperlink.

4.3.3.6 Creating a newsletter using a static HTML template

Starting point: you have created an e-zine that specifies a static HTML template. Your HTML coding skills are "excellent" and you have a very good knowledge of the template you are using.

1. Select the e-zine and click its `My Editions` container.
2. Click the **New edition** button on the right side of the screen
3. Enter a name for the edition in the **Name** field and a value in the **Subject** field.
4. Click the **Save** button to save your changes. In the list of editions that appears, click the **edit** button of the edition you just created. The **Edit edition – Specify edition properties** screen appears.

This screen allows you to edit the HTML version and the Text version of the page separately. In the HTML version you edit the HTML in an **Edit HTML version** screen; in the text version you edit the text in an **Edit Text version** screen.

HTML version:

Button	Function
Edit	Edit the HTML in the edition you just created or load an optional template. To load an optional template, click the **Browse** field, navigate to the file you want to load and click the **Open** button in the dialog.
Preview	Preview the page in HTML (no editing functions). Tripolis Mail opens

	a separate window that displays a representation of the page, as it will appear to your subscribers.
Export	Export the page as a HTML file. Tripolis Mail prompts you for a download location. Click the **Save** button, navigate to the location and click the **Save** button again.
Manage click counters	Displays a list of all the links included in the web page, allowing you to select links for click tracking. Click the appropriate link checkbox **on**.
Add open counter	When you click this button, the default Veritate counter or the counter specified in the e-zine is added to the edition. This button is greyed if the open counter is has already been added to the edition.

Text version

Button	Function
Edit	Edit the text in the edition you just created or load an optional template. To load an optional template, click the **Browse** field, navigate to the file you want to load and click the **Open** button in the dialog. Try to use hyperlinks shorter than 70 characters. If you set the wrap text button to **on**, links that contain more than 70 characters may be cut off and not function correctly. If this happens, disable wrapping and correct the affected links.
Preview	Preview the text version, as it will appear to your subscribers.
Export	Export the page as a text file. Tripolis Mail prompts you for a download location. Click the **Save** button, navigate to the location and click the **Save** button again.
Manage click counters	Displays a list of all the links included in the edition and allows you to select links to include in click tracking. Click the appropriate link checkbox **on** and click the **Save** button.

4.3.4 Printing a newsletter

You can print a newsletter but this presents some problems, which are related to MS Windows. The first problem concerns images – these may display as blank white spaces. This is not caused by Tripolis Mail or an error in the newsletter, but by MS-Windows. The second problem relates to the background of a mailing, which may be invisible in the printed version but visible in the newsletter. You can solve these issues by changing a printing option in Internet Explorer.

To set the printing option on in Internet Explorer:
1. Start Internet Explorer.
2. From the toolbar, click the **Tools** option and then click **Internet Options**.
3. Click the **Advanced** tab on the Internet Options screen.
4. Locate the **Print background colors and images** option and click its checkbox **on**.

5 Creating and sending a mailing to subscribers

This is the module in Tripolis Mail where you combine a newsletter with a list of subscribers and transmit the newsletter to the subscribers. At this stage you have created an edition of a newsletter (described in section 4.3 above) and created a list of subscribers that will receive the newsletter (described in section 3.2 above). You are ready to test the newsletter on a test list, selected from your full list of subscribers. When you are satisfied with the results you can transmit the newsletter to the full list.

5.1 Viewing a list of transmitted newsletters

Click **Mailings** from the **Main Menu**. On the left side of the screen, Tripolis Mail displays a `My Mailings` container. When you click this container, the right side of the screen displays a list of mailings you have transmitted. At the top of the screen the buttons **Personalized**, **Test** and **All** display the type of mailing you sent (you select the type in the Mailing wizard, described below). Click any of the buttons to display the appropriate list.

Personalized	Displays your personalised mailings, that is, mailings that contain text such as 'Dear Ms Casey' instead of 'Dear Subscriber'. For more information on how to personalise email, see section 5.2.1 This is the default format of newsletters.
Test	Displays the test mailings you sent. This type of mailing (typically sent to a small list) is sent to recipients in both HTML and text format. The word `TEST` is included in the subject line. Statistics are maintained on recipients (see section 6 below). You can also personalise a test version.
Sample	All test mailings which has been using sample data. If a sample source has been defined for a test list, you can choose 'Sample test' as type of mailing in the mailing wizard. All recipients of the test list will receive a certain amount of test mails with random data of recipients in your sample source list. (see section 3.5 for more information)
All	Displays a list of all mailings transmitted.

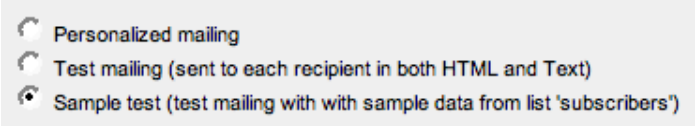
The fields in the mailings list are described below.

Action	Refers to actions you can currently perform on the mailing (see step 9 below).
ID	Identifies the mailing; this number is generated by Tripolis Mail during the mailing process.
e-zine	The e-zine from which the edition was created.
Edition	The edition used in the mailing. If you click any item in this list, a preview of the newsletter appears.
Database	The database from which the list was created.
List	The list used for the mailing.
Embargo	The date and time on which the mailing was sent.
Recipients	The number of recipients.
Type	The type of mailing (see table above).
Status	The transmission status of the mailing. The options are `pending`, `sending` or `sent`.

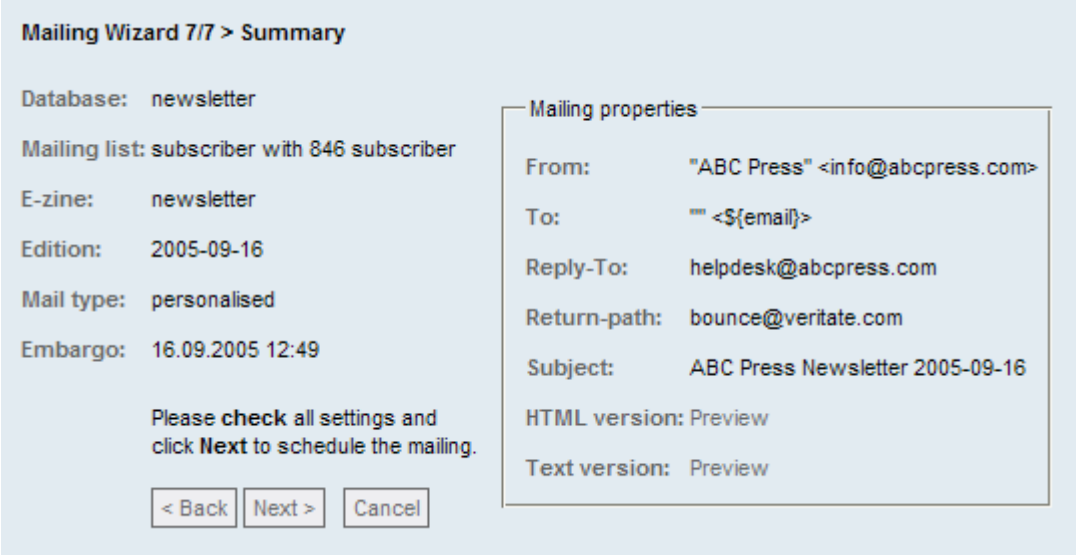
5.2 Sending an edition to a list of subscribers

To do this:

1. Click **Mailings** from the **Main Menu** and click the **Mailing Wizard** button. You now step through the mailing wizard. For each step, click the **Next** button to proceed or the **Back** button to choose from a previous step.
2. **Step 1:** select a database from the dropdown list.
3. **Step 2:** select a list from the database selected in step 1.
4. **Step 3:** select an e-zine from the dropdown list.
5. **Step 4:** select an edition from the e-zine selected in step 3.
6. **Step 5:** Tripolis Mail displays a list of mailing types.


Personalized mailing
Test mailing (sent to each recipient in both HTML and Text)
Sample test (test mailing with with sample data from list 'subscribers')

   Choose a type from the list of types displayed (see 5.1 above).
7. **Step 6:** Select an embargo date and time, that is, a date and time for transmitting the edition.
8. **Step 7:** Tripolis Mail displays a summary of your selections. Check that you have made the correct choices. A **Preview** button allows you to preview the HTML or text versions of the edition.



9. When you click the **Next** button in step 7, Tripolis Mail starts the transmission process, but the mailing is not yet sent. The mailing is added to the transmission list, and the screen changes to display a list of all your mailings. Click the **Personalized**, **Test** or **All** buttons to view the mailing you just scheduled. Its current status is shown in the Status field. If you do not delete or edit the mailing, this field receives the value `pending` up to the moment of transmission. It then receives the value `sending` while the mailing is being transmitted and the value `sent` once it has been transmitted. If you (temporarily) cancel the mailing this field takes the value `not ready` (see below).

   Rescheduling or deleting a mailing: note the **delete** and **edit** buttons in the Action field while the mailing has the status `pending` or `not ready`. These buttons allow you to (i) remove the mailing entirely from the transmission list or (ii) remove the mailing temporarily from the transmission list or (iii) reschedule its transmission time and date. To remove the mailing entirely from the transmission list, click the **delete** button and click **OK** in response to the prompt. To temporarily cancel a mailing, click the **edit** button and click the **Cancel** button in the Edit/view mailing screen that appears. The value in the mailing's Status field now changes to `not ready` and the transmission list reappears. You can now edit the embargo timestamp or reschedule the mailing. To

change the timestamp, click the **edit** button, enter a new date and time in the Embargo field and click the **Save** button. To reinsert the mailing in the transmission list, click the **Schedule** button. The value in the mailing's Status field now changes to `pending` and the mailing is transmitted on the date and time you entered.

5.2.1 Personalising your mailings

You can personalise you emails in Tripolis Mail (mail merge), that is, you enter field codes in the email headers (e-zine properties) or in the text of your mailing. When the email is transmitted the code resolves to its relevant value, for example a subscriber can be addressed by his title and last name, for example `Dear Mr Jones` instead of `Dear Subscriber`.

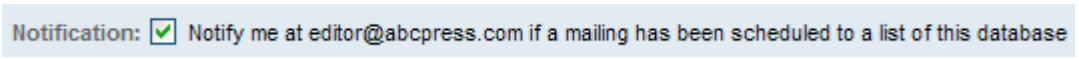
For each field, you enter the code `$!{fieldname}`, where `fieldname` refers to the name of the field in the database. To view a list of fields in a database, display the properties of the database (see section 3.6.1 above). Note that field names are case sensitive, if the name of the field is AccountNumber, enter `$!{AccountNumber}` as a code.

It is also possible to personalise your content, based on rules depending on field values in the database. Veritate engineers will assist you in setting up content personalisation.

Always test a personalised mailing on a test set before transmission. This test list should be created from the same database as the full list.

5.2.2 Email notification

A notification email can be automatically sent to you, whenever a mailing is being scheduled to a mailing list of a database. In order to turn the email notification on, go to **List Management** and choose a database. On the **Datebase properties** page (see 3.6.1) enable notification as shown below.



6 Statistics

6.1 Database and mailing list statistics

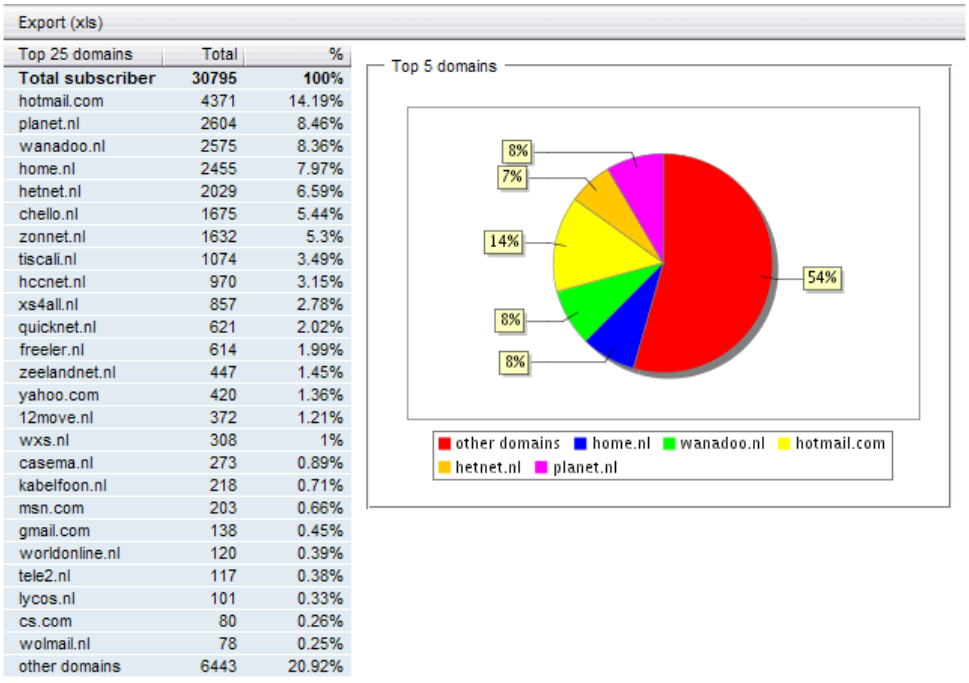
For each database and selected mailing lists Tripolis Mail can display some basic statistics, like the amount of used mail types, most frequent domains and subscribe and unsubscribe activities.

To access the database statistics:

1. Click the Statistics button from the Main Menu. The left side of the screen displays a `My Statistics` container.
2. Expand the databases container by clicking on `My Databases`. A list of available databases will be shown.
3. Click on the statistics icon or the name of the database on the left side to select the database and display its statistics.

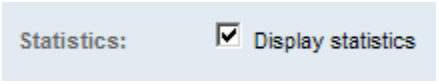
Subscriber	Total number of subscribers in the database
Subscriber not in any mailing list	Displays the number of subscribers, which are not subscribed to any mailing list.
Status 0, 1 or 2	Amount of subscriber per status. If the bounce handler or double opt-in subscribe procedure has been used, a subscriber might have status 0 (disabled). Status 1 (enabled) is the normal condition. Status 2 (imported) indicates that a subscriber has been imported with the Import Wizard, these subscriber are also enabled all will receive mailings.
Mail type 0-4	Displays how many subscribers are receiving which mail type.

Next to this overview, domain statistics are available. Select `Domains` in the navigation menu to display the domain statistics. The top 25 of all domains of subscriber emails in the database will be displayed. A complete list with all domains can be exported as Microsoft Excel file.



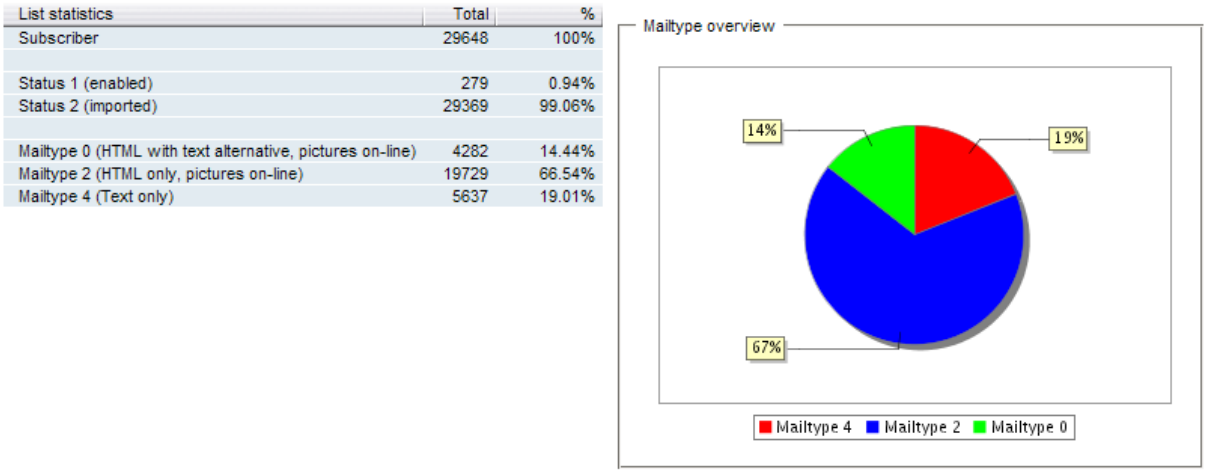
6.1.1 Mailing list statistics

Before statistics can be displayed, the mailing list has to be enabled on the mailing list edit page.



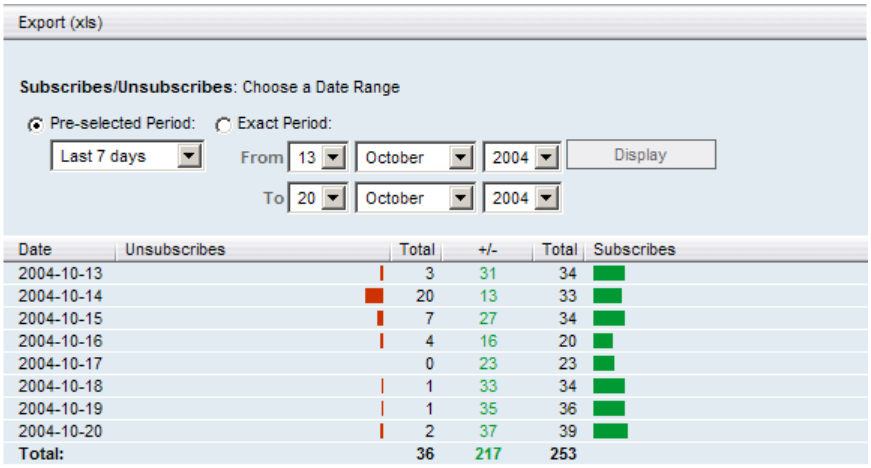
To enable the statistics display of a mailing list:
1. Click the **List Management** button from the **Main Menu** and expand the database containing the mailing list on the left side of the screen.
2. Click on the name of the mailing list and check *Display statistics*.

All enabled mailing list will now be displayed on the Statistics page just as in the **List Management** section. Select a mailing list to display an overview, similar to the database statistics.



List statistics	Total	%
Subscriber	29648	100%
Status 1 (enabled)	279	0.94%
Status 2 (imported)	29369	99.06%
Mailtype 0 (HTML with text alternative, pictures on-line)	4282	14.44%
Mailtype 2 (HTML only, pictures on-line)	19729	66.54%
Mailtype 4 (Text only)	5637	19.01%

Click the Subscribes/Unsubscribes button from the menu to display subscribe and unsubscribe activities of the chosen list. Only activities which occurred via web or XML-RPC interface have been recorded. Subscribers added with the **Import Wizard** or other Tripolis Mail functions are not being registered as subscribes (or unsubscribes).



Date	Unsubscribes	Total	+/-	Total	Subscribes
2004-10-13		3	31	34	
2004-10-14		20	13	33	
2004-10-15		7	27	34	
2004-10-16		4	16	20	
2004-10-17		0	23	23	
2004-10-18		1	33	34	
2004-10-19		1	35	36	
2004-10-20		2	37	39	
Total:		**36**	**217**	**253**	

You can choose the date range of the display and export the result as Microsoft Excel file.

6.2 Mail statistics

Tripolis Mail maintains statistics on each mailing. For example, you can view the number of recipients, the number who successfully received the mailing, the number who opened the mailing ('opens') or the number who clicked a link in the mailing ('clicks'). Per email address, you can view the IP number and other relevant data. The statistics section thus gives you online, real-time access to statistical data on the Test or Personalised newsletters you have transmitted.

To access the statistics module:

1. Click the **Statistics** button from the **Main Menu**. The left side of the screen displays a `My Statistics` container.
2. Expand this container and click the `My Mailings` or the `My Mailings per Database` container that appears. Tripolis Mail displays a list of email transmissions on the right side of the screen. The list is divided into the sections **Personalized**, **Test** and **All**. These refer to the type of mailing you selected in the mailing wizard. Click the appropriate button to display a list of transmitted mailings for each type.

   The **Quick View**, **Mail**, **Opens**, **Clicks** and **Click Channel** buttons at the top of the screen give you access to statistical data on a mailing. The first table below provides a brief overview of the contents of each button.

   Compare Statistics allows you to compare the results of various mailings with eachother.

   Two more buttons, **Query Statistics** and **Export Statistics** allow you to select subscribers, based on the "mailing behaviour", and export statistical data as a CSV file. Each button is described below.

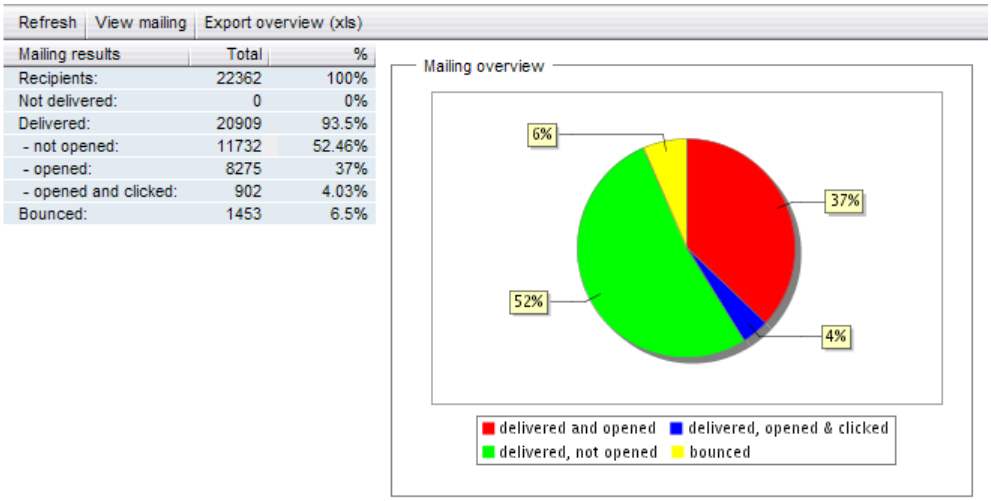
3. Click the **select** button of the mailing you want to view, and then click one of the **Quick View**, **Mail**, **Opens, Clicks** or **Click Channel** buttons.

The remaining fields on this screen (Action, ID and so on) contain information on the mailings, and are described in section 5.1 above. The first table below provides a brief overview of the contents of each button. For more information, see the subsequent tables.

Quick View	The default view when you select a mailing. This view contains a summary of the main indicators (number transmitted, number successfully delivered, number bounced).
Mail	An overview of mailing-list delivery statistics: the number of mails transmitted and the number successfully delivered. The difference between these two data items is explained by the so-called "bounce report". You can export the general results of these statistics as Microsoft Excel file and the detailed data as CSV file.
Opens	An overview of the frequency of email open operations ("opens"); the frequency of opens during various time intervals (e.g. hour, week, month). You can view the results in graphical format, export the overview as Microsoft Excel file or export the detailed data as a CSV file.
Clicks	Displays statistics on the click behaviour of recipients. You can generate a report on click behaviour for each URL in the email. You can export the general results of these statistics as Microsoft Excel file and the detailed data as CSV file.
Click Channel	Displays the click channel statistics for the selected mailing
Query Statistics	Select subscribers based on statistical data (deliveries, bounces, clicks and so on).
Export Statistics	Download a CSV file that combines the profile fields of subscribers with their open and click behaviour for a specific mailing.

6.2.1 Quick View

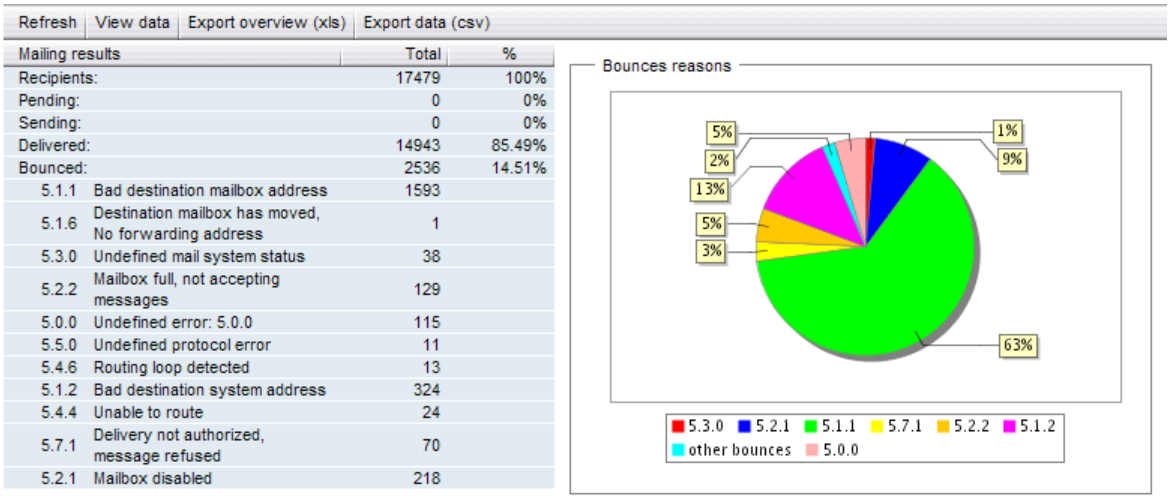
General statistics on the mailing.



Recipients	The number of email addresses in the mailing list.
Not delivered	The number of unsuccessful deliveries.
Delivered	The number of successfully delivered emails.
- not opened	The number of unopened emails.
- opened but not clicked	The number of recipients that opened the email, but who have not clicked on any click counters yet.
- opened and clicked	The number of recipients that opened the email and clicked on a link.
Bounced	The number of addresses that returned a bounce message.

6.2.2 Mail

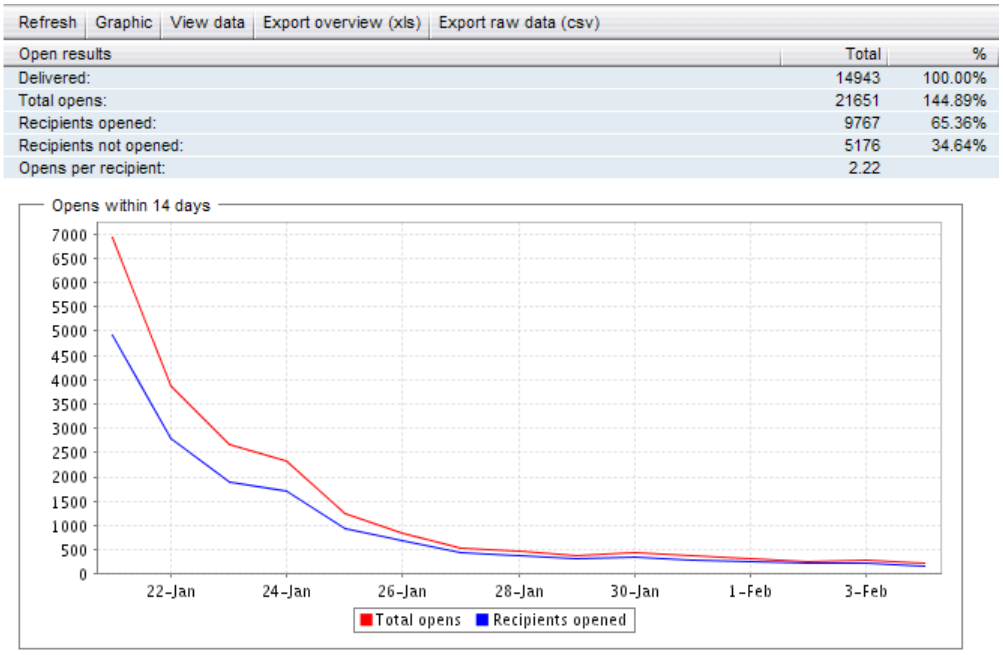
An overview of the mailing statistics



Recipients	The number of email addresses in the mailing list.
Pending	The number of email addresses currently with status `pending`
Sending	The number of mails currently being transmitted.
Delivered	The number of emails already delivered.
Bounced	The number of addresses that returned a bounce message.

6.2.3 Opens

Statistics on open operations by recipients

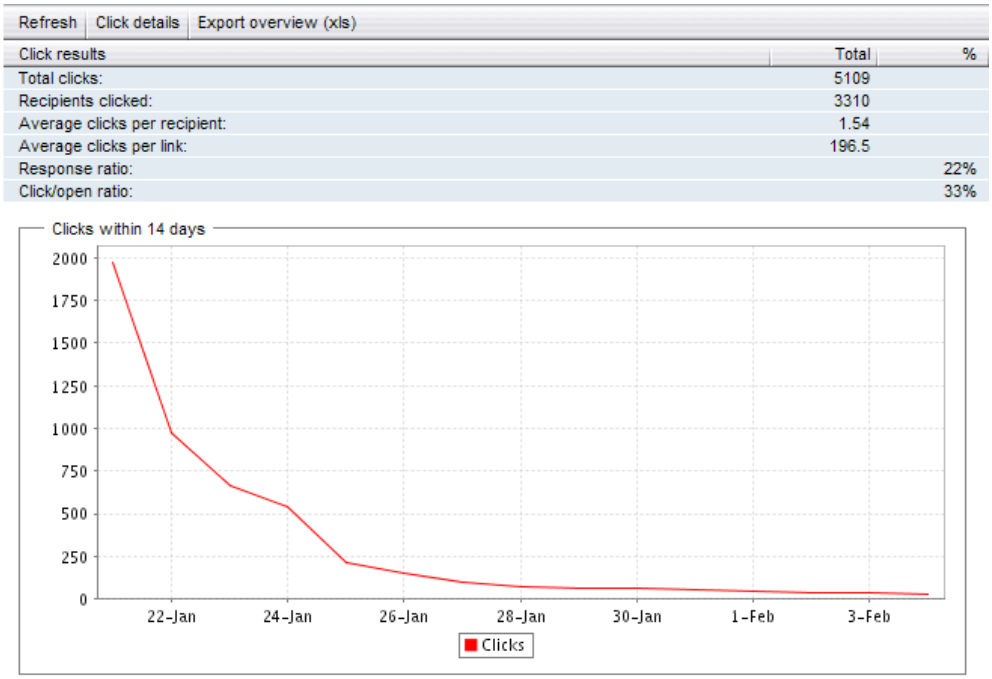


Delivered	The number of recipients who successfully received the mailing.
Total opens	The total number of openings.
Recipients opened	The number of recipients who opened the mailing.
Recipients not opened	The number of recipients who have not (yet) opened the mailing.
Opens per recipient	The average number of openings for all recipients.

6.2.4 Clicks

Statistics on click operations by recipients

Total clicks	The total number of clicks in the mailing.
Recipients clicked	The number of recipients that clicked any one of the URLs with a click counter in the mailing.
Average clicks per recipients	The average number of clicks on any one of the URLs in the mailing per recipient.
Average clicks per link	The average number of clicks per active click counter.
Response Ratio	The percentage of the total number of recipients that clicked on a URL.
Click/open ratio	The ratio of the number of clicks to the number of opens.



Click on the 'Click details' button to display the detailed results for each URL in the mailing with a click counter. Choose 'Export click details (csv)' to save these results as comma separated file.
Select a URL and click on 'View data' to see which recipients clicked on the URL at which time.

6.2.5 Click Channels

Statistics on click operations per Click Channel by recipients. Click Channels are being explained in 6.3 below.

CTR	Click through rate of the mailing, click channel or link. This is the ratio between the number of clicks and the number of opens.
Clicks	The absolute number of clicks per mailing, click channel or link.

6.2.6 Compare statistics

General results like opens and clicks can be compared across various mailings. First make a selection of a database, a list or e-zine. A list of all available mailings for the selection will be displayed. Select the mailings which you would like to compare with each other. The selected mailings will be displayed in the lower half of the screen with the basic results of those mailings. A more detailed list and a list of all click results can be exported as Excel file.

6.2.7 Querying statistics

In Tripolis Mail you can query the mailing statistics that Tripolis Mail maintains, and use the results for a variety of purposes. For example, you can select those subscribers who opened a mailing or who clicked a specific link in the mailing. You can create a new list with the selection or remove the subscribers from an existing list. When you make a selection, in addition to specifying a mailing, you use the following criteria (here called 'operators') to select subscribers. How to use the operators is described below.

6.2.7.1 Operators used for querying mail statistics

Bounced a mailing that bounced.
Delivered a mailing that was successfully delivered
Not opened email addresses that did not open the mailing
Opened email addresses that opened the mailing
Not clicked email addresses that did not click a specified link in the mailing

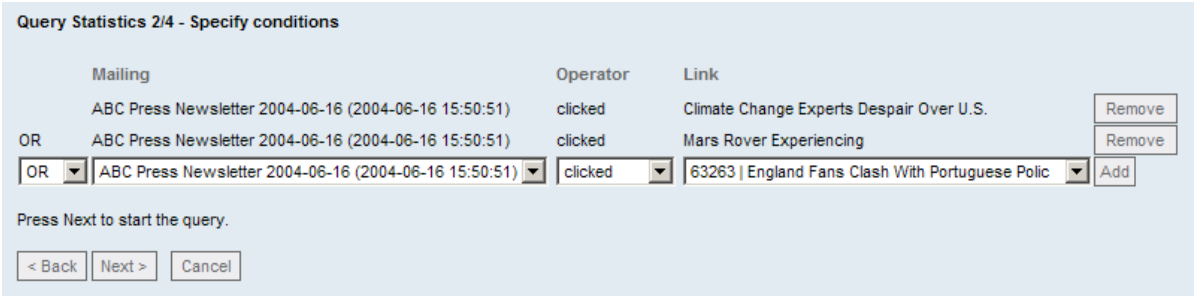
Clicked email addresses that clicked a specified link in the mailing

The procedure for querying statistics is as follows:

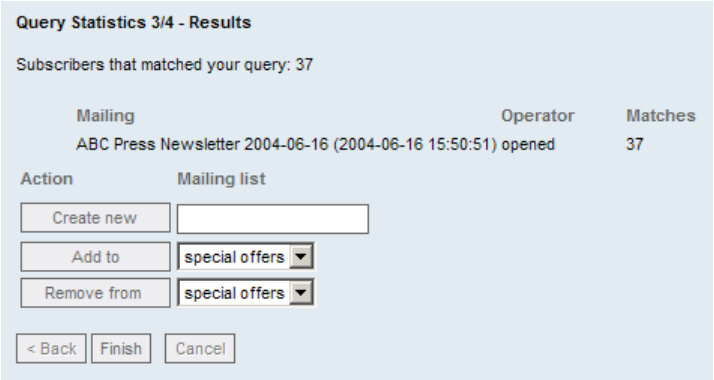
1. From the Main Menu, click the **Statistics** button.
2. Click the **Query Statistics** button. A wizard guides you through a series of steps to create the query. For each step, click the **Next** button to proceed or the **Back** button to choose from a previous step.

Using the wizard, do the following.

3. **Step 1:** From the dropdown list, select the database or the list you want to investigate.
4. **Step 2:** In a dropdown list, Tripolis Mail displays a list of mailings that were sent using the database or list you selected. You now select a mailing and an operator and add these to the query.
    a. Select a mailing from the Mailing dropdown list.
    b. Select an operator from the Operator dropdown list. If you select the `click` operator, Tripolis Mail displays a dropdown list of links that were included in the mailing you selected. Select a link from the list.
    c. Click the **Add** button to add the line to your query.
    d. Repeat the previous steps until you have entered all the lines you require in the query. To remove a line, click the **Remove** button next to the line. The screen below is an example of two query lines for links in a mailing.



5. If your query is successful (one or more subscribers are selected), a screen similar to the one shown below appears. From this screen you can:
    a. Create a new list: enter a name in the Create new field.
    b. Add the selection to an existing list: select a list from the dropdown field
    c. Remove the selection from an existing list: select a list from the dropdown field. This is useful, for example if you want to remove from a list those subscribers who have not opened the mailings specified in your query line(s).



6. Enter the name of a new list and click the **Create new** button or click the **Add to** or **Remove from** buttons. Click the **Finish** button without processing the results further.

6.2.8 Exporting statistics

This facility allows you to create and export a file that contains information on the open and click behaviour of recipients of a specific mailing. In addition to an identifier for the mailing and the recipient, the CSV file you export contains information on 'open' and 'click' behaviour (how often the user opened the email and which links the user clicked).

The procedure is as follows:

1. Click the **Statistics** button from the **Main Menu**. The left side of the screen shows a `My Statistics` container.
2. Expand this container and click the `My Mailings` container that appears. Tripolis Mail displays a list of email transmissions on the right side of the screen. Click one of the **Personalized**, **Test** or **All** buttons to display the mailing you want to export (see section 5.1 above for an explanation of these buttons).
3. Click the **Select** button of the mailing you want to export.
4. Click the **Export Statistics** button and then click the **Next** button.
5. Click **Save** in response to the prompt, and enter the name of a file in the **Save As** dialog.

The download time depends on the number of recipients in the CSV file and the number of links that Tripolis Mail has processed. You can import the resulting CSV export file in Microsoft Excel. For information on importing a CSV file into MS Access or Excel, see section 3.6.13 above

An example of one record from an export file is shown below. An export file includes columns for each profile field in the list, but for clarity these are omitted below.

Mailing	Email	Status	Reason	Opened	URL x	URL y
1546	jjanssen@abcpress.com	sent		2004-06-20 16:06:21	"2004-06-20 16:10:18"	

The file can be read as follows:
"Mailing 1546 for Ms Janssen was delivered successfully (status = `sent`). At 16:06 on June 20th 2004, the email was opened for the first time (note that successive opens do not overwrite this date-time stamp). URL x was clicked at 16:10:18; URL y has not (yet) been clicked. If the email bounced, the reason is entered in the Reason column as a three-digit code."

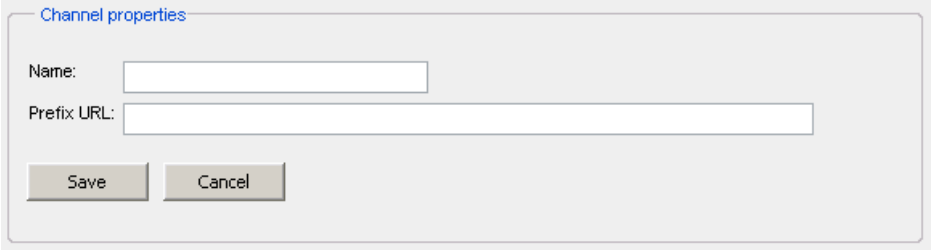
6.3 Click Channels

With Click Channels you can group click counters of various mailings. This way you can compare the click response on certain hyperlinks between various mailings.

6.3.1 Adding a new Click Channel

1. Click the **Statistics** button from the **Main Menu**. The left side of the screen displays a list of `Statistics` containers.
2. Click the `My Click Channels` container that appears.

3. Click on **Add Click Channel** or click on the edit icon. The screen below will be displayed.



4. Enter a unique name for the Click Channel
5. Enter an optional prefix URL. This prefix URL will be used to assign click counters automatically to a channel when you create click counters
6. Click the **Save** button to save your changes. The list of Click Channels will be displayed. From here you can select the **statistics** icon to view the results of each channel or **edit** the channel properties.

7 Administration

The Administration module allows users to modify their settings, for example a user can modify his password and user name. A user should also enter an email address and phone number for communication with other users.

You should seriously consider entering a contact phone number, as this is very useful for Veritate engineers and support when they need to contact customers.

Note that passwords are case sensitive in Tripolis Mail. If you enter a password in upper or lower case (or a mixture of both), you must enter exactly the same characters in the logon dialog.

To access the Administration module, click **Administration** from the Main Menu. The left side of the screen displays the `User list` container. Click this container to display a list of users. A user currently online has the value `online` in the Status column. To send an email to a user, click the user's icon.

Using the Tripolis Mail Administrator module, an administrator can add and remove users from Tripolis Mail and monitor user access options, for example access to Tripolis Mail modules and to databases and lists. In the User Rights field, the administrator can allocate one or more functions to a user.

8 Appendix

8.1 About Mail Types

In the Mailing module, Tripolis Mail can send an edition to recipients in five different variants, based on the following criteria:

1. *Format:* are HTML, plain text or both HTML and text sent to the subscriber? In the last case (Multipart) the subscriber's mail application automatically selects the best format for transmission. Note that this option is not available for all email applications.

2. *Images:* are the images sent with the email or does the subscriber retrieve them from the Internet (the Tripolis web-server) when he opens the email? The main advantage of retrieving images from the Internet is a smaller email size in Kbytes. The disadvantage is that, for subscribers with a dial-in connection, the subscriber's email package dials the provider to collect the images when he opens the email, which can be irritating for the recipient.

Based on the above criteria, the following mailing types are available. In the List Management module you can select the appropriate type for each subscriber in the **mail type** field. If the subscriber joins the mailing list on-line, he selects a mail type as an option. You can also specify a mail type when you import a **CSV** file of subscribers.

8.1.1 Email contains HTML and plain text (Multipart)

In this case two variants are available:

8.1.1.1 Type 0: ASCII + HTML – images not included

The email is sent in both ASCII and HTML format and any images included are retrieved from the Tripolis web-server when the email is opened. This type is most suitable if you are using webmail or if you are constantly online. The images referenced in the email are linked to their source on the Tripolis Mail server and are retrieved when the email is opened.

This type is applicable to recipients using the following applications:
- Hotmail
- Yahoo!
- Gmail
- Excite
- Microsoft Outlook
- Microsoft Outlook Express
- Netscape Communicator
- AltaVista
- Email.com
- Lotus notes
- AppleMail

8.1.1.2 Type 1: ASCII + HTML – images included

In this case images are included in the email. This type usually functions correctly with recent versions of the more commonly used email applications. Recipients who use a dial-in Internet connection to retrieve their email usually choose this option.

This type is applicable to recipients using the following application:
- Microsoft Outlook 2003 (this email client does not retrieve online images by default).

8.1.2 Email contains HTML only

8.1.2.1 Type 2: HTML – images not included

This type is applicable if a recipient uses webmail (which supports HTML) to retrieve his email, but where the HTML display is not optimal on the web client.

This type is applicable to recipients using the following application:
- Pegasus

8.1.2.2 Type 3: HTML – images included

This type is applicable if the mail program supports HTML but where HTML display is not optimal.

This type is applicable to recipients using the following application:
- Eudora 4.x

8.1.3 Email contains text only

8.1.3.1 Type 4: text version

Select this type if your email application does not support HTML or if you do not require HTML in your email.
This type is applicable to recipients using the following applications:
- FreeMail
- AOL
- Compuserve
- Mutt
- Pine

8.2 RSS

With Tripolis Mail RSS feeds can be processed as well as published.

RSS is a Web content syndication format. Its name is an acronym for ***R**eally **S**imple **S**yndication*. RSS is a dialect of XML. All RSS files must conform to the XML 1.0 specification[1], as published on the World Wide Web Consortium (W3C) website.

For more information about RSS, please visit:
- http://en.wikipedia.org/wiki/Really_Simple_Syndication
- http://www-106.ibm.com/developerworks/xml/library/x-rss20/
- http://blogs.law.harvard.edu/tech/rss

8.2.1 Including RSS feeds

In CMS template editions RSS 2.0 feeds can be used to import external articles into sections of an edition. These might be feeds from your own content management system or any other source.

Adding a feed to a section:
1. Click the **Content** button from the **Main menu** and select the e-zine of the newsletter on the left side.
2. Select **Manage Sections** from the menu. A list of your sections will be displayed.
3. Click the **Edit** button of the section which should receive articles from a RSS feed. The name of the section must be the same as the title of the RSS channel (see mapping).
4. Enter the URL of the RSS feed.

[1] http://www.w3.org/TR/REC-xml

You can activate and deactivate the RSS feed at any time. By default, articles of the RSS feed will replace all existing articles of the section. Alternatively it is also possible to add RSS feed articles to the section.

Mapping of standard elements of a RSS feed to the Tripolis Mail CMS:

Channel -> title	Section name
Channel -> item -> title	Article title
Channel -> item -> description	Article content
Channel -> item -> link	Article property "href"
Channel -> item -> enclosure (type image/jpeg, image/gif or image/png)	Article property "image" (URL only!)
Channel -> item -> author	Article property "author"
Channel -> item -> pubDate	Article property "pubDate"
Channel -> item -> category	Article property "category"

Articles imported from a RSS feed will be marked with a RSS icon on the article page of the CMS.

8.2.2 Publishing RSS feeds

Section articles of a CMS edition can also be published as RSS 2.0 feed. This RSS syndication can be used to import the articles in a different edition, to publish the articles on a website (many Content Management Systems offer RSS aggregation) or to read the articles with a RSS reader.

In order to publish RSS feeds, fill in the fields on the section edit page as shown in the example below. Once you have chosen a mailing list, the URL of the RSS feed will be displayed. Articles are considered published, once they have been mailed to the selected mailing list. The RSS feed will always display the articles of the last mailing which has been sent to the list.

The fields title, link, image URL and description can be used to customize the RSS feed.

8.3 Tips for successful Email publishing

8.3.1 Choose relevant topics

The subject line and the sender text are the first items that a recipient sees in your mailing. It's hard to overemphasise the importance of these items. Often these two fields do not truly reflect the content of the email, or the subject line is uninteresting. The content of the subject line should stimulate the reader to open the email.

8.3.2 Keep your subscriber list up-to-date

A recipient usually enters his name personally when he subscribes to your mailing list. This is often done carelessly. Recipients often type their names with Caps Lock on. To ensure that your recipients receive a tidy-looking email, you should "unclutter" these fields regularly, which implies a well-organised data management system on your part. Remove duplicate email addresses regularly.

8.3.3 Separate objective content from commercial information

In general, recipients will not object to the inclusion of third party advertisements in your email. By separating objective content from commercial messages, you avoid confusing and irritating readers and you increase the email's readability. You can achieve this by placing the non-commercial and commercial information in separate categories. In HTML mailings, place these in separate areas.

8.3.4 Avoid upper case text

Information considered important is often displayed in upper case. Readers often perceive this as 'screaming headlines'.

8.3.5 Use white space carefully

Do not include an excess of information in your email – this makes for disordered-looking emails. Use ample amounts of white space in your email.

8.3.6 Do not send lengthy emails

There are many reasons why your emails should be short, and this aspect is particularly important for recipients with dial-in connections. A lengthy email is not usually a problem for text emails, due to their smaller size. Restrict email size to 30 KB or less. Also restrict the amount of scrolling required by the reader – the maximum recommended is three A4 size pages (three screens). Remember it's not usually necessary to include more than this amount of information in one email.

8.3.7 Be brief and to the point

Be concise and to the point about the main topics in your email. Experience has shown that the first few lines of a message are the most important. Use these lines to outline the issue's contents and to stimulate the recipients to read further.

8.3.8 Use short paragraphs

Divide emails with a large amount of content into short paragraphs. Each paragraph can contain a preview of the complete article, which is then reached by a hyperlink. Note that email can be forwarded to others, which often results in the text of your email appearing lower down in the forwarded mail.

A browser that cuts off long sentences with a hard return will often result in sloppy-looking paragraphs. The following tips may be useful: restrict the size of text lines and insert your own hard returns. Finally it should be noted that long words may not appear in the HTML version of an email – this applies in particular to words placed in a 120-pixel column. In this case hyphenate the word yourself.

8.3.9 Aim for a constant delivery schedule

The frequency of delivery should be consistent, that is, you should try to deliver the email at the same time each week, month etc. Timing can be essential, especially for periodic newsletters, and this will stimulate the image of a reliable, professional newsletter.

9 Index

administration, 52
automatic bounce handling, 19
Bounced, 46
case sensitive, 17
certified users, 7
click counters, 28, 31
Click Statistics, 43, 45
CMS template, 27, 32
content personalisation, 42
content section, 26
copy and paste from MS-Word, 27
counters, 28
create a CSV file, 10
CSV, 10, 11, 13, 23, 50
database
  create, 12
  properties, 15
double opt-in, 19
Edition, 7
embargo, 40
Exclude Wizard, 21
Export Statistics, 45
Export Wizard, 23
e-zine, 7, 26, 29
  Advanced Options, 31
  Manage sections, 32
General statistics, 46
headers, 29
hyperlinks, 37
image
  insert, 37
  upload, 37
Import Wizard, 11
internal links, 38
key user, 7
Key values, 10
List Management, 10
mail merge, 42
Mail Statistics, 43, 45
mail types, 53
Mailing, 7
Mailing Wizard, 41
merge two lists, 21
Microsoft Access, 23
Microsoft Excel, 23
Microsoft Outlook 2003, 53
multipart, 53
open counter, 29, 35
Open Statistics, 43, 45
open tracking, 29
Pending, 46
Personalized, 40
pop-up killers, 8
printing, 39
Query Statistics, 45
Recipients, 46
return-path, 30
Sample amount, 14
Sample test, 14
Selection Wizard, 20
sending a mailing, 40
split one list, 21
static HTML, 38
statistics, 44
subscriber
  add, 22
  delete, 18
  disabled, 19
  edit, 22
  enabled, 19
  find, 17
  import, 11
  remove, 19
Subscriber, 7
syntax errors, 13
Template, 7
templates, 26, 31
test mail, 14
Unique opens, 46
User, 7
Visual Editor, 35
Visual Editor template, 34